Employee and Manager Self Service Manual

Author: Arunkumar T

Creation Date: July 25 , 2015

Last Updated: **August 15, 2015**

Revision: 1.0

Change Record

Date	Author	Revision	Change Reference
25-Jul-15	Arunkumar. T	1.0	

Table of Contents

1. Objective and assumptions 4

1.1. Objective 4

2. Employee Self Service 5

2.1. How to apply leave as an Employee 5

2.2. How to withdraw approved leave 9

2.3. How to check Payslip 11

2.4. How to set preferences 13

2.5. How to track the approval 15

3. Manager Self Service 19

3.1. How to approve or reject leave by login in to the Oracle application 19

3.2. How to apply leave to a sub ordinate 22

3.3. How to delicate approvals during vacation 26

1. Objective and assumptions

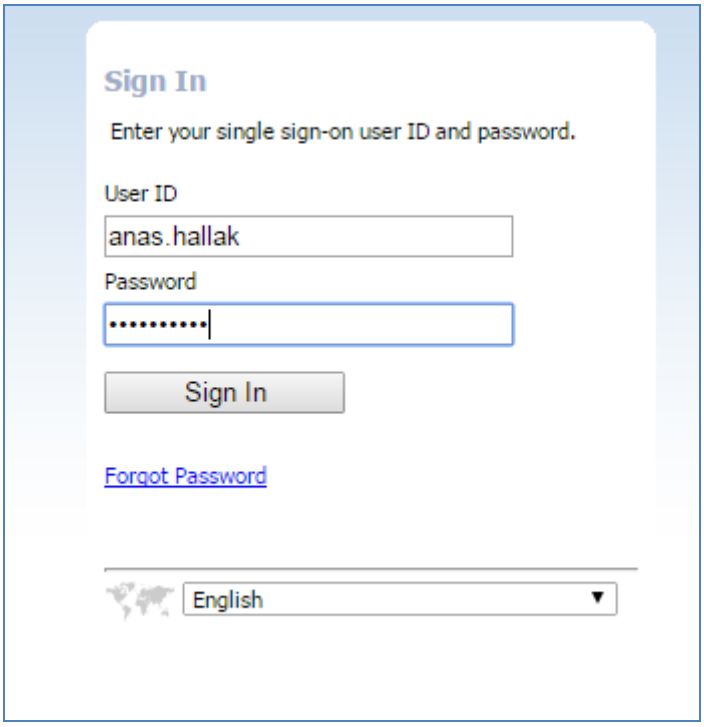
1.1. Objective

This document helps CSEH user to get trained on Employee self-service and Manager Self Service

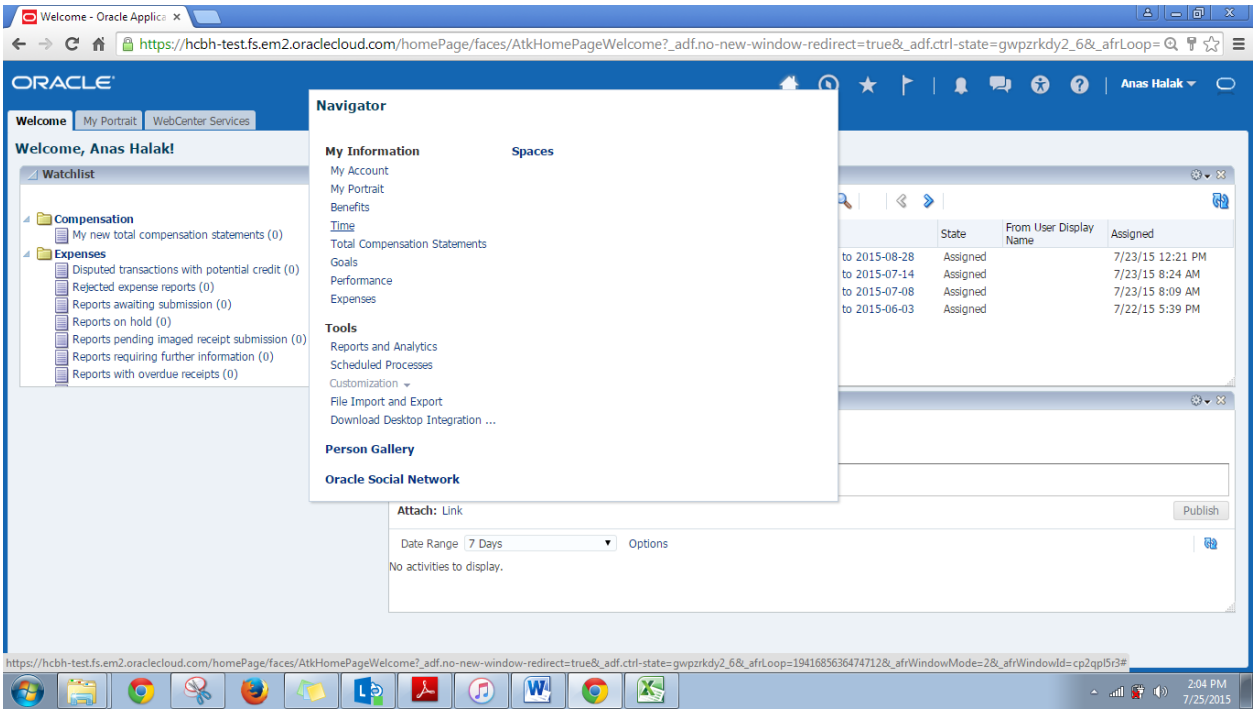
2. Employee Self Service

2.1. How to apply leave as an Employee

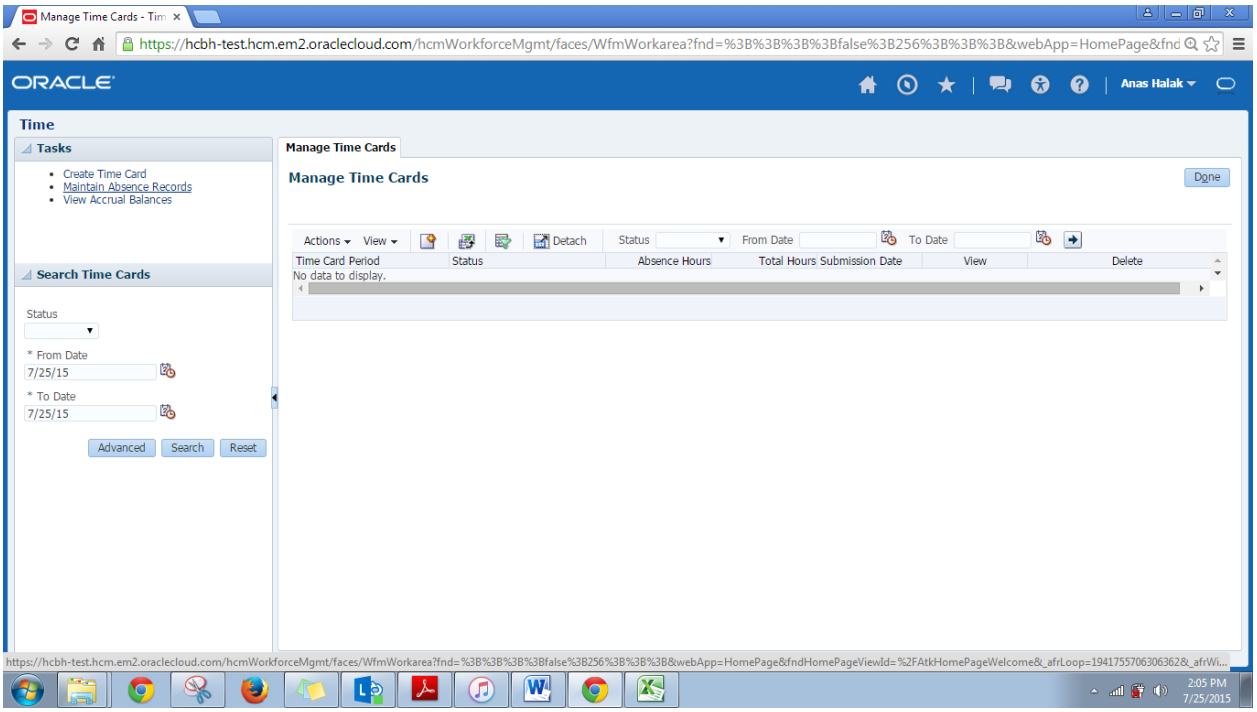
Step1: Login in to the application with the given user name and password



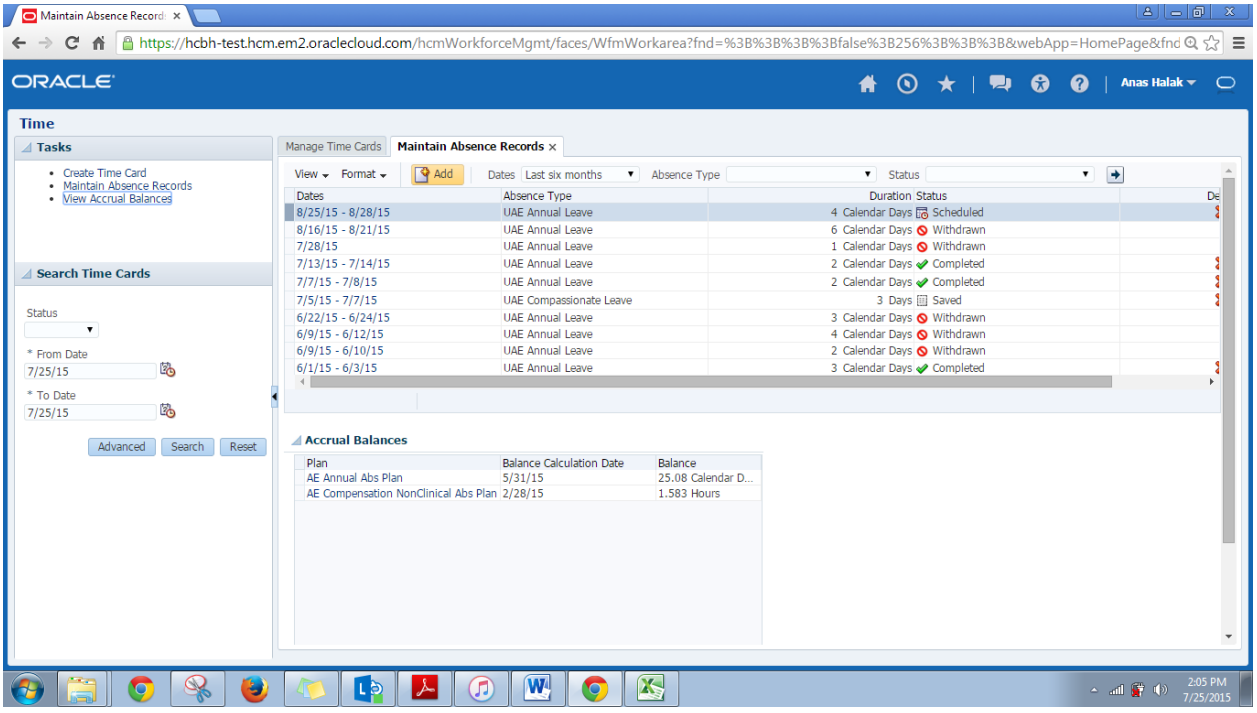
Step2: Click on Navigator → Time



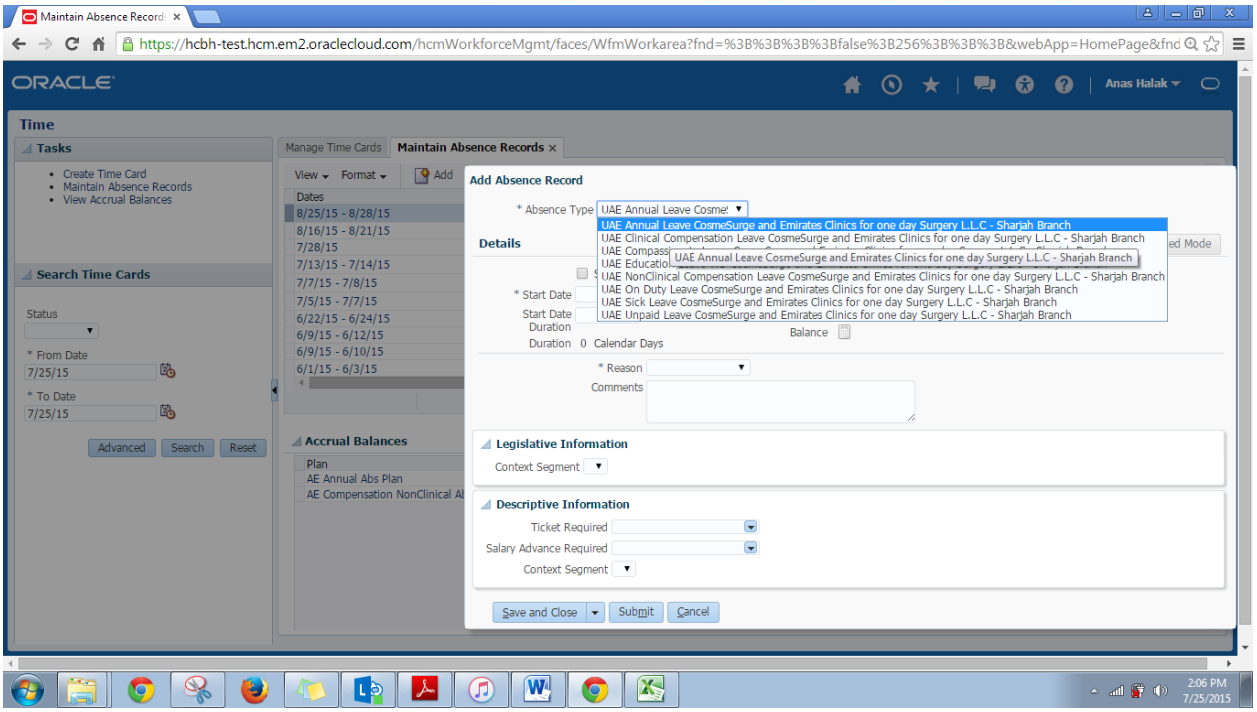
Step 3: Click on Manage Absence Record



Step 4: To add New Absence Record click on ADD



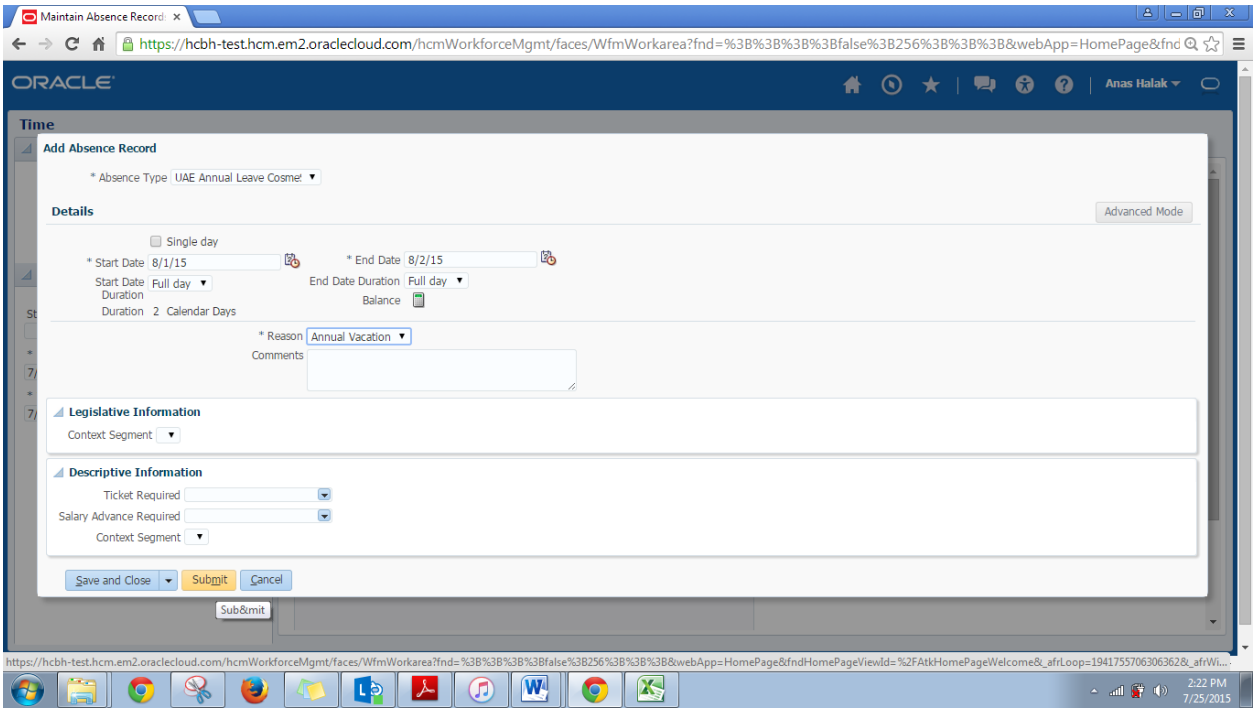
Step 5: select absence type to be recorded

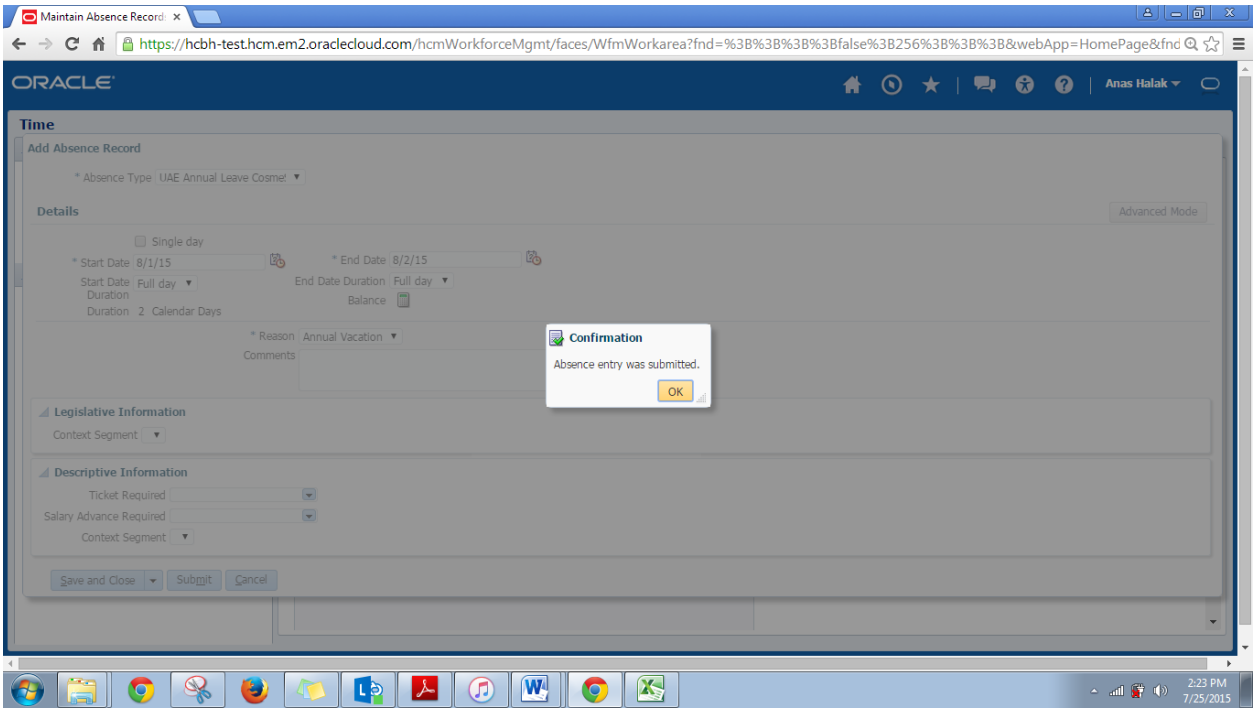


Step 6: Fill the details

Field Name	**Explanation**
Single Day (Check box)	Select if leave needs to be applied for one day
Start Date	Leave start date
End Date	Leave End date
Start Date Duration/End Date Duration	Auto filled based on start date and end date selection
Reason	Select one of the reason for the absence
Comments	Any additional information needs to be conveyed to manager for the leave approval
Ticket Required	Select yes - If against annual leave Ticket needs to be issued
Salary Advance Required	Select yes - If against annual leave salary advance is required

Step 7: Click submit → leave will be submitted for branch manager approval.


Maintain Absence Record
https://hcbh-test.hcm.em2.oraclecloud.com/hcmWorkforceMgmt/faces/WfmWorkarea?fnd=%3B%3B%3B%3Bfalse%3B256%3B%3B%3B%3B&webApp=HomePage&fnd
ORACLE
Anas Halak
Time
Add Absence Record
* Absence Type UAE Annual Leave Cosme
Details
Advanced Mode
Single day
* Start Date 8/1/15
* End Date 8/2/15
Start Date Duration Full day
End Date Duration Full day
Duration 2 Calendar Days
Balance
* Reason Annual Vacation
Comments
Legislative Information
Context Segment
Descriptive Information
Ticket Required
Salary Advance Required
Context Segment
Save and Close
Submit
Cancel
Sub&mit
2:22 PM
7/25/2015

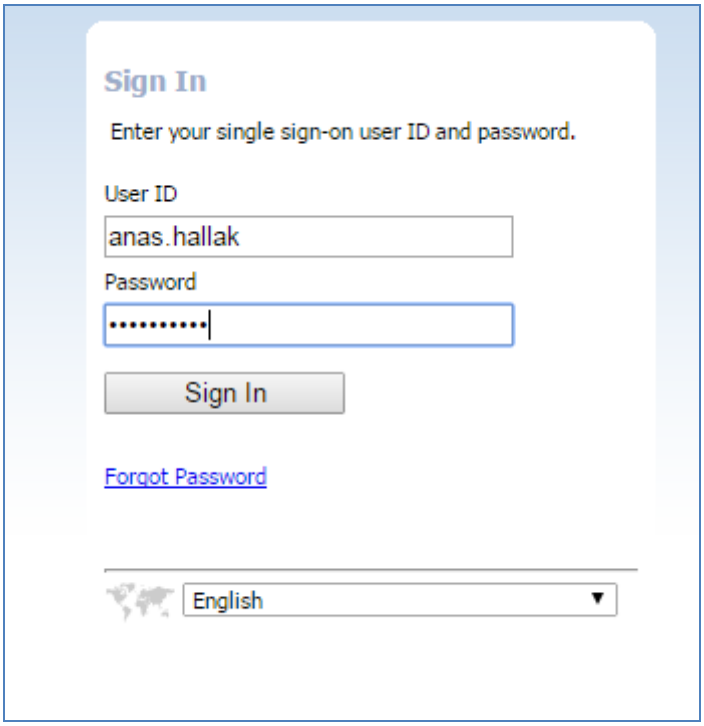

Maintain Absence Record
https://hcbh-test.hcm.em2.oraclecloud.com/hcmWorkforceMgmt/faces/WfmWorkarea?fnd=%3B%3B%3B%3Bfalse%3B256%3B%3B%3B%3B&webApp=HomePage&fnd
ORACLE
Anas Halak
Time
Add Absence Record
Details
Advanced Mode
Confirmation
Absence entry was submitted.
OK
Legislative Information
Descriptive Information
Save and Close
Submit
Cancel
2:23 PM
7/25/2015

2.2. How to withdraw approved leave

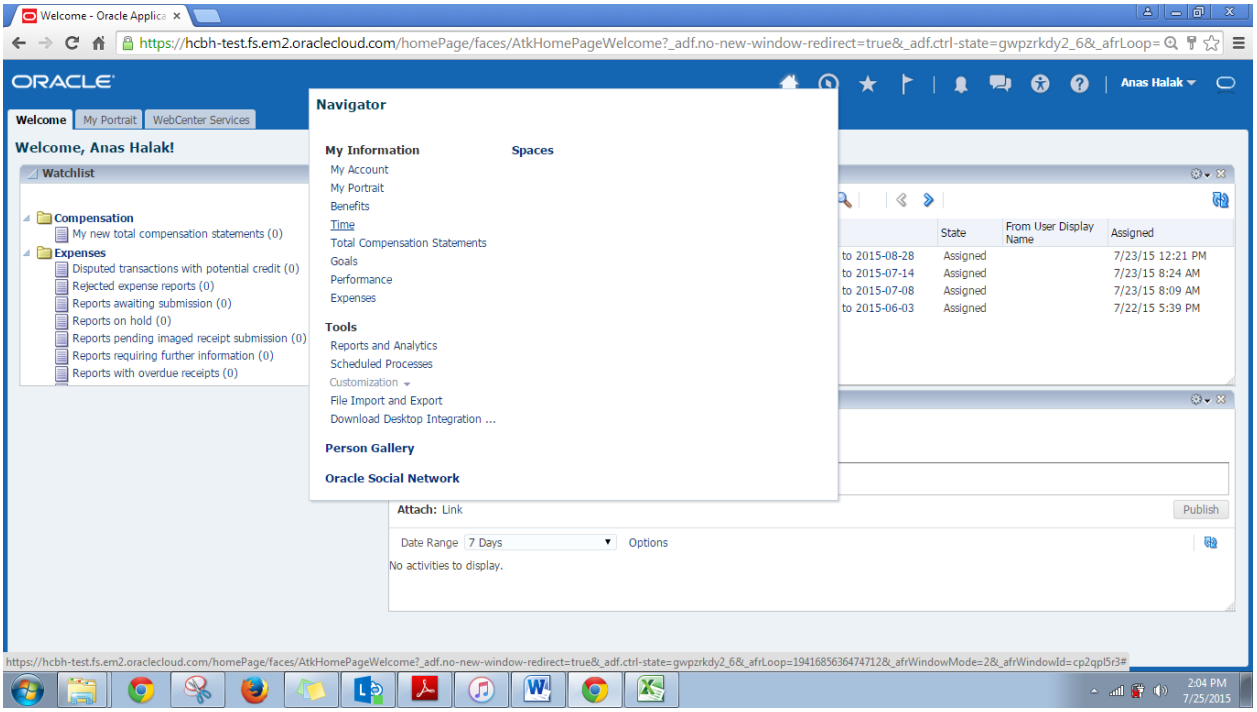
If approved leave is withdrawn before the absence start date then no approval triggers, if the absence dates are already became past date and then if the leave is withdrawn it triggers approval to the branch manager.

For eg., if a leave is applied by employee on 8th August 2015 and got approved. If employee withdraw the leave record on or before 8th August 2015 approval is not required after 8th August if the leave is withdrawn then it triggers approval to branch manager.

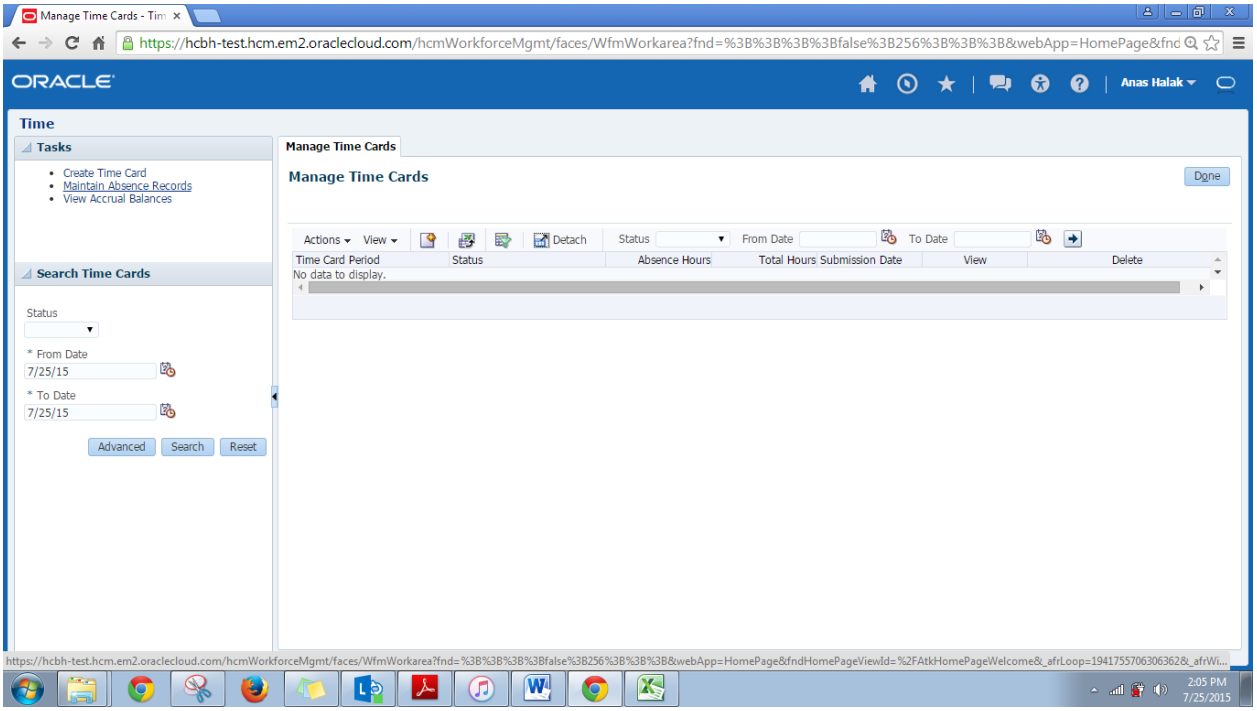
Step1: Login in to the application with the given user name and password



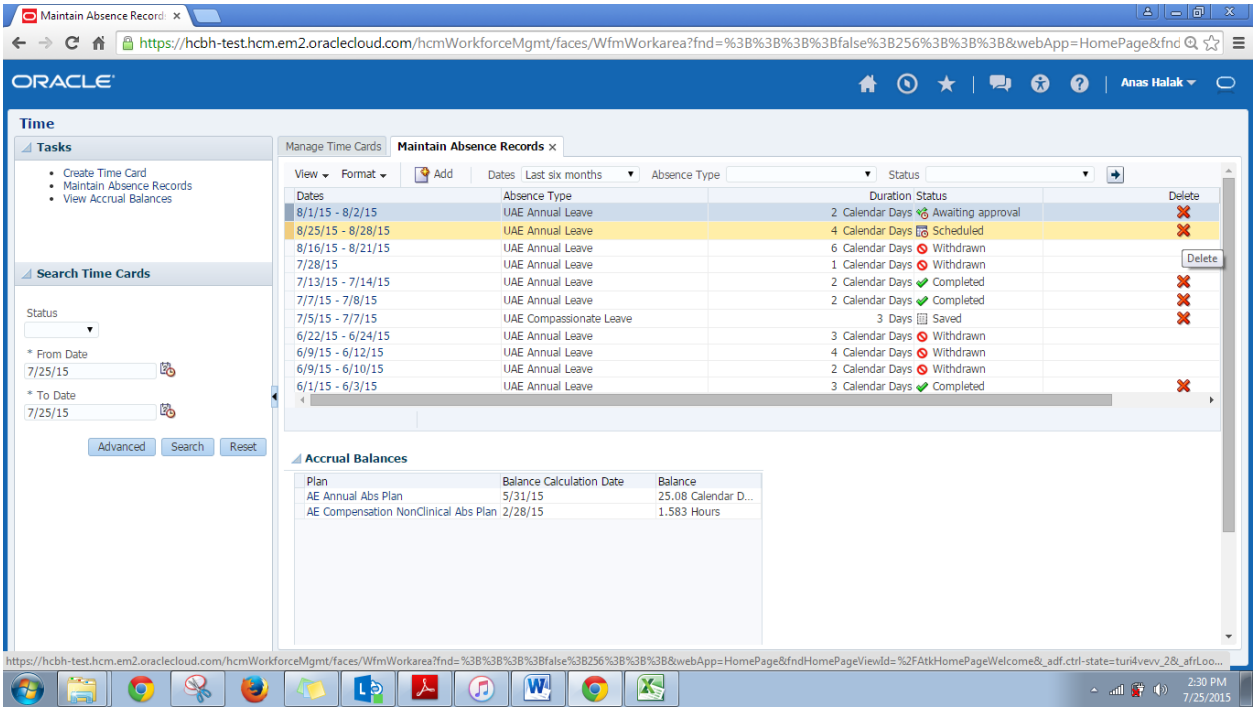
Step2: Click on Navigator → Time



Step 3: Click on Maintain Absence Record



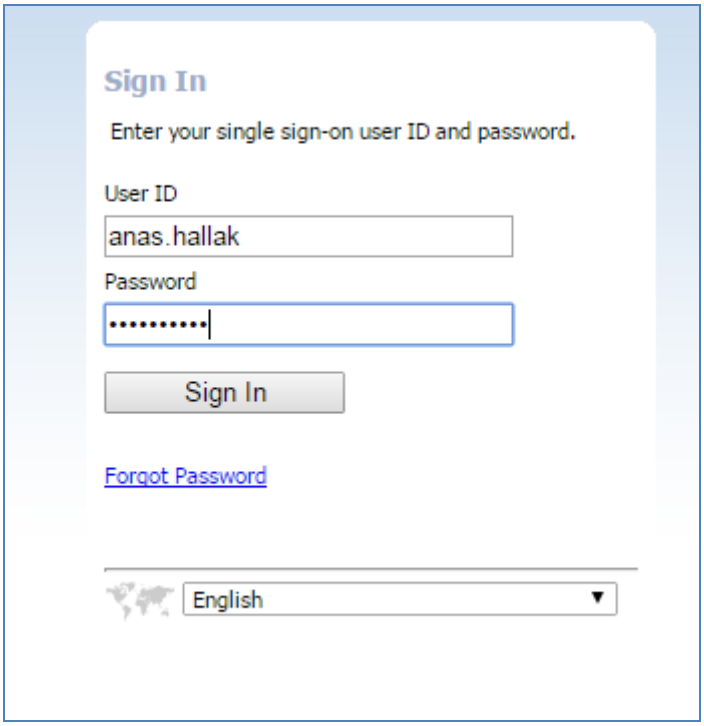
Step 4: List of absence record applied and its status can be seen, using the last column (Delete) user can with draw approved or submitted leave record.



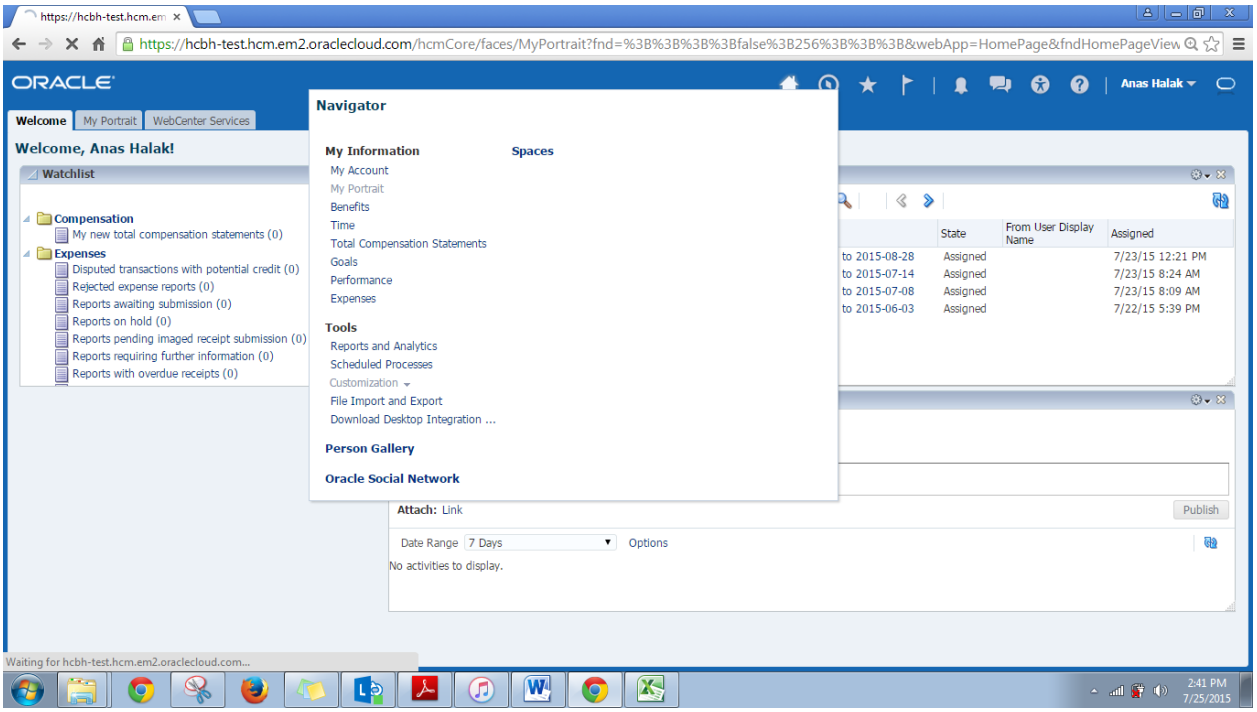
Leave Record Status	Explanation
Awaiting Approval	Leave submitted and yet to be approved
Scheduled	Future Date Leave record submitted and approved
Saved	Leave record entered but not submitted for approval
Withdrawn	Submitted leave record deleted by Employee

2.3. How to check Payslip

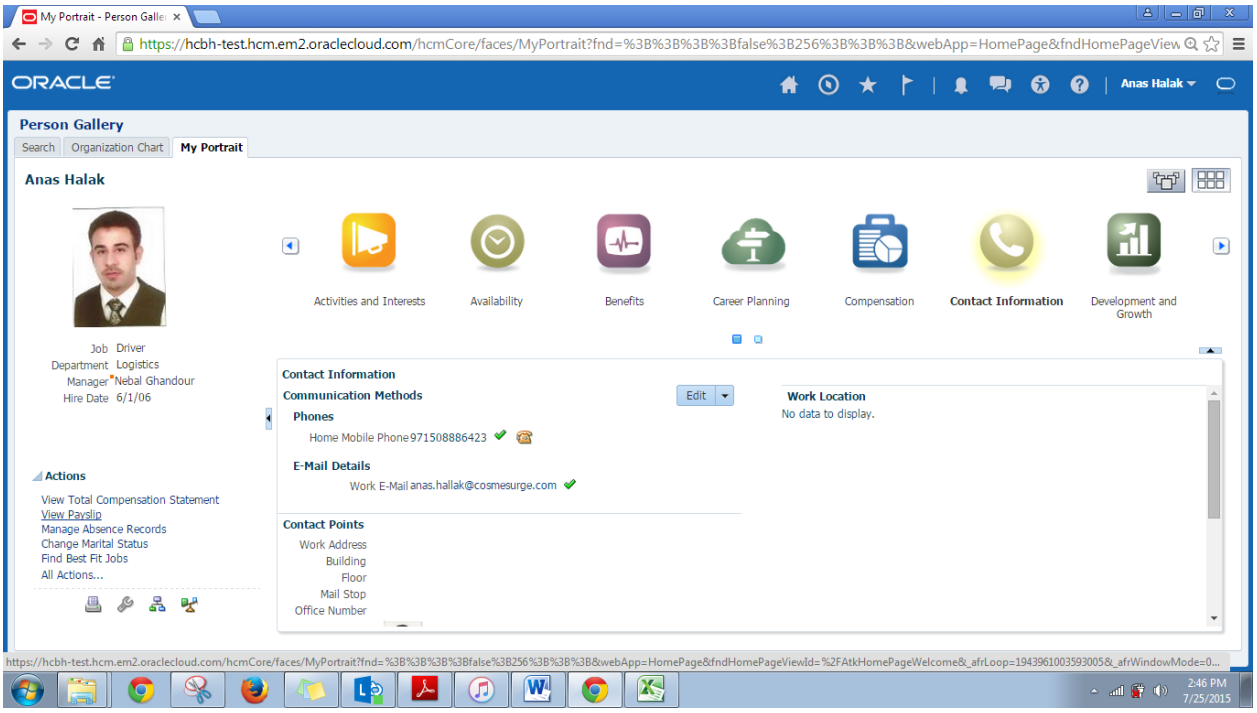
Step1: Login in to the application with the given user name and password



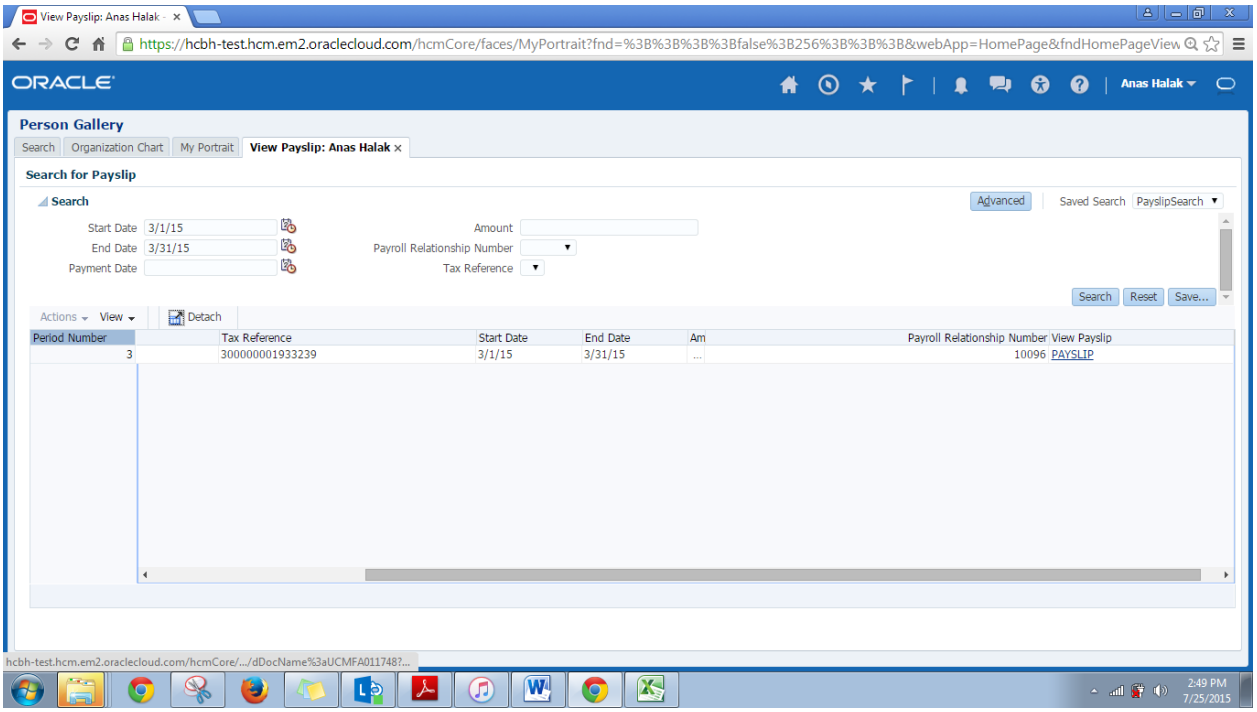
Step 2: Navigator →My Portrait



Step 3:Click on View Payslip



Step 4: Enter the start date and End date of the month for which payslip is required → Click Search.

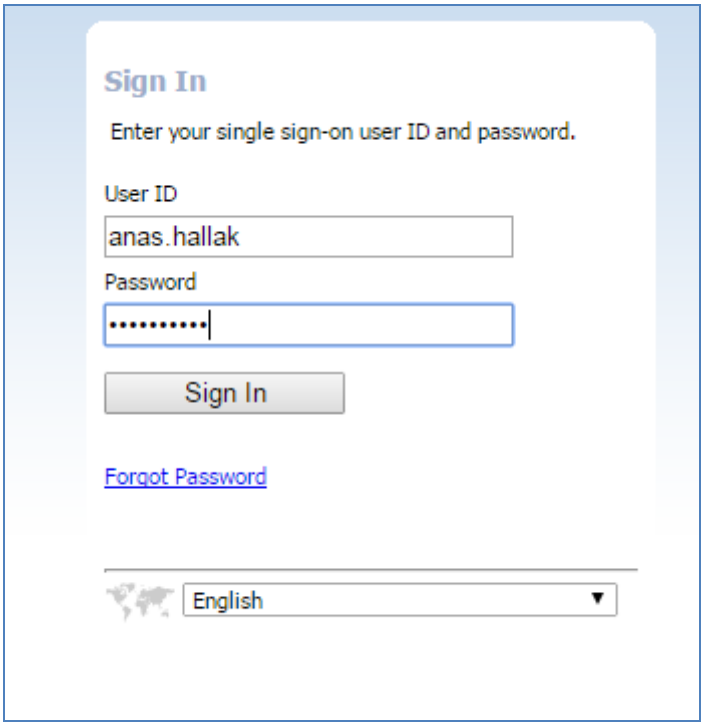


In the last view payslip click on the PAYSLIP link to view the payslip.

2.4. How to set preferences

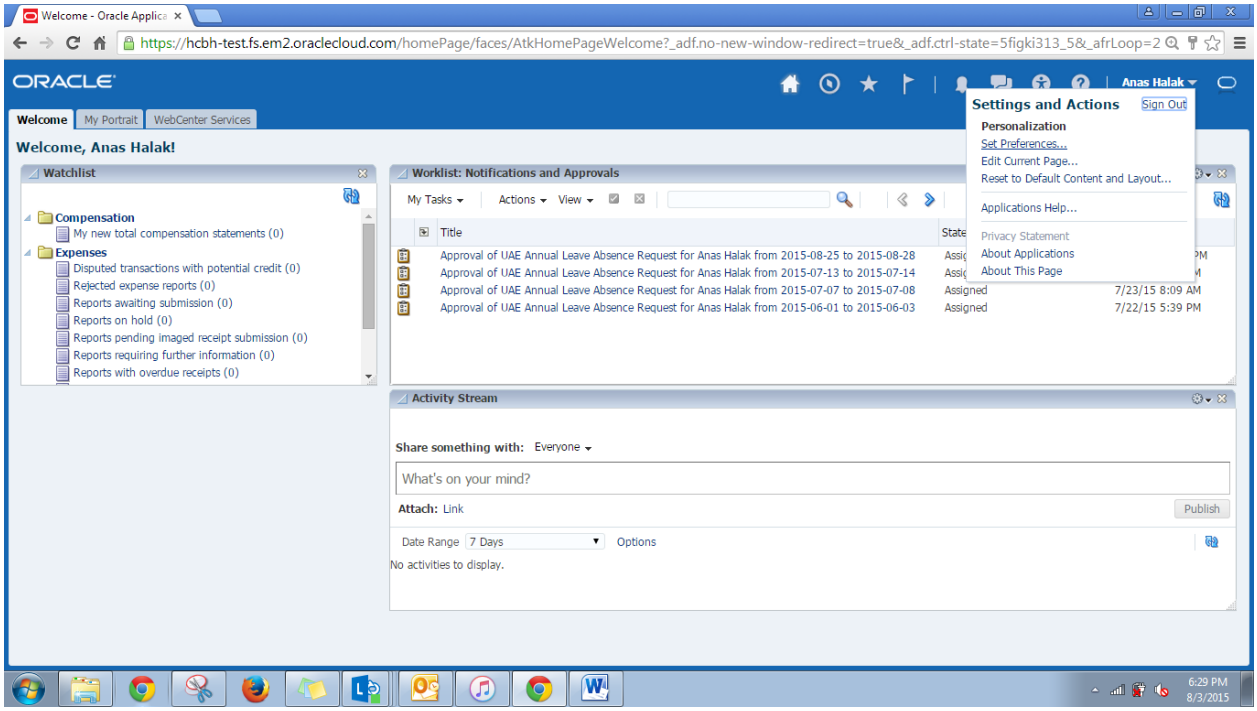
To change the date format from mm/dd/yyyy to dd/mm/yyyy.

Step1: Login in to the application with the given user name and password

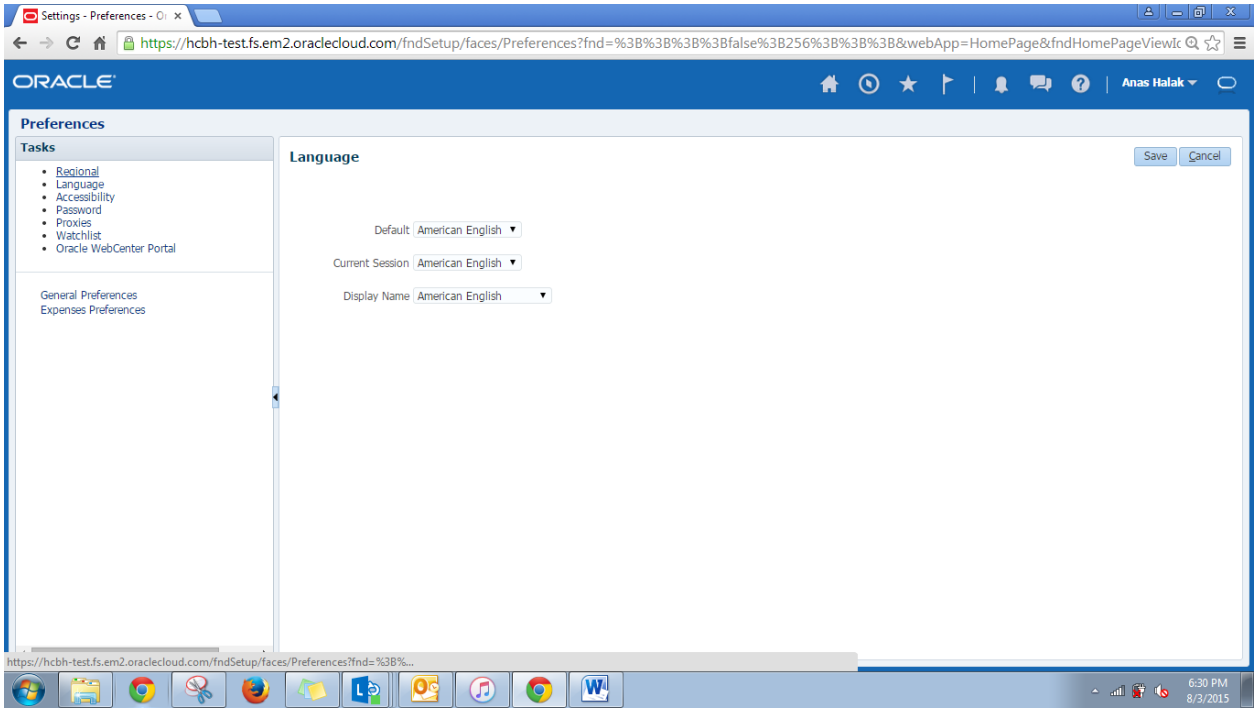


Step2:

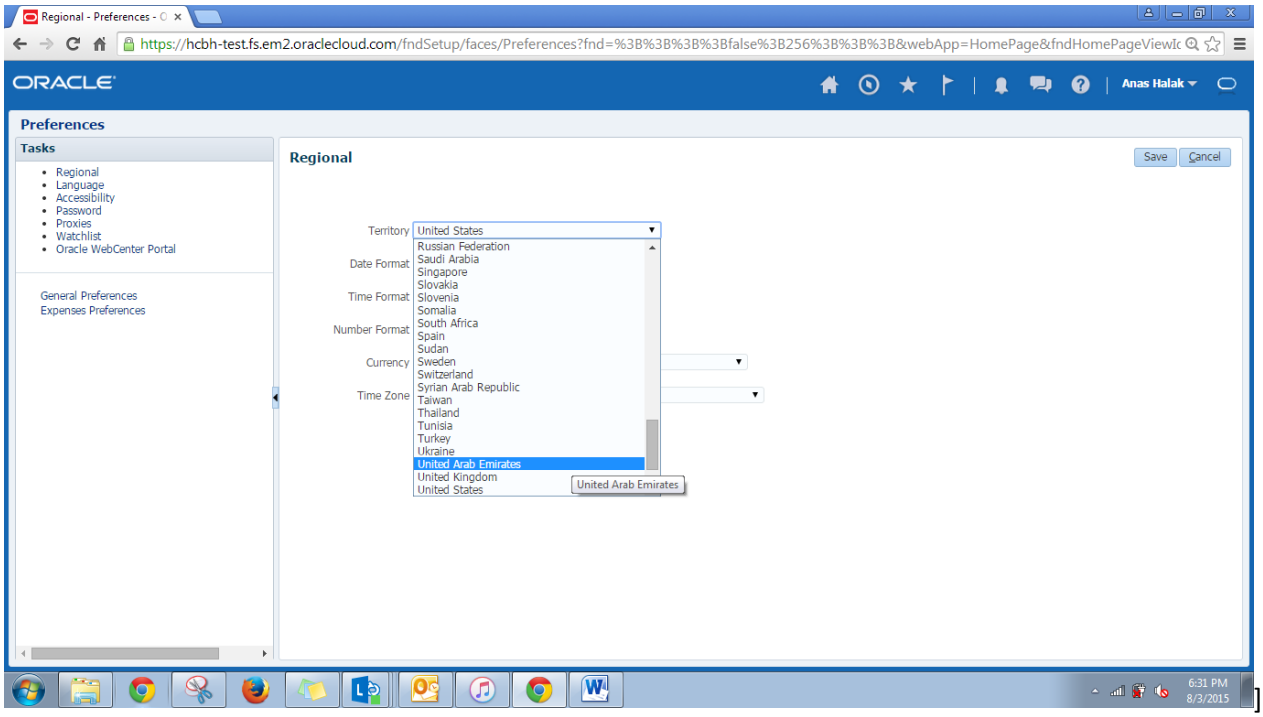
Click on the arrow next to your name on the top right corner → Click on Set Preferences



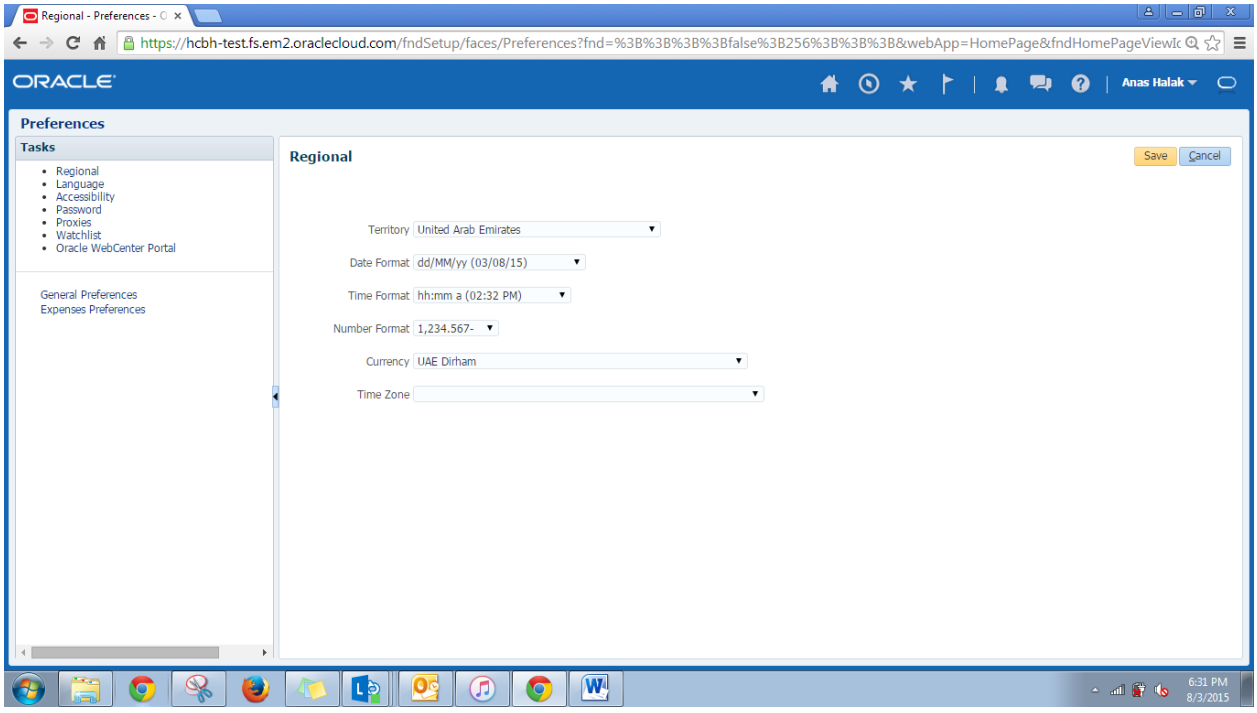
Step3: Click on Regional



Step 4: Change the territory: United Arab Emirates

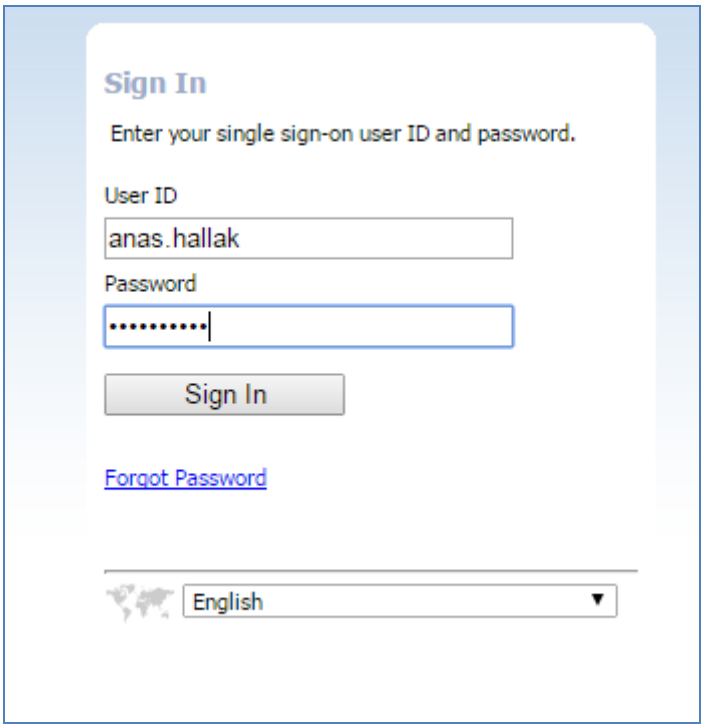


Step 5: Click Save



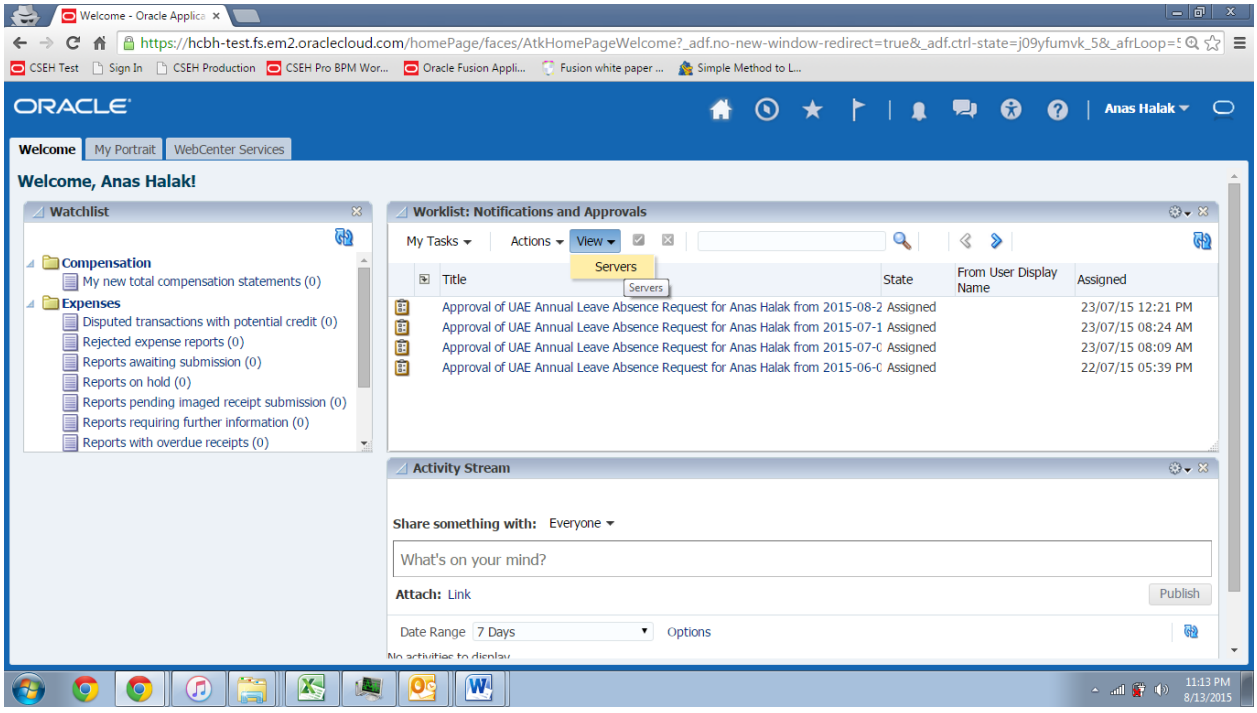
2.5. How to track the approval

Step1: Login in to the application with the given user name and password

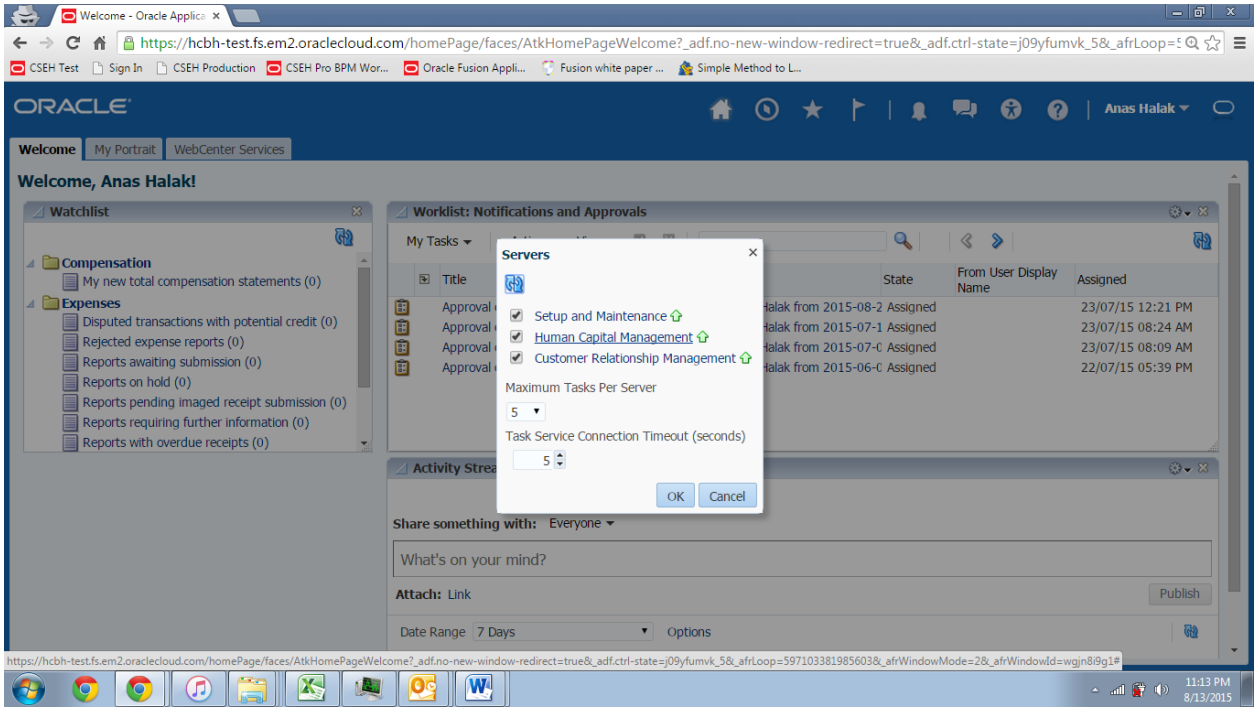


Step2:

In the home page, under worklist: Notification and Approvals → View → Servers (ensure pop up blocker enabled)

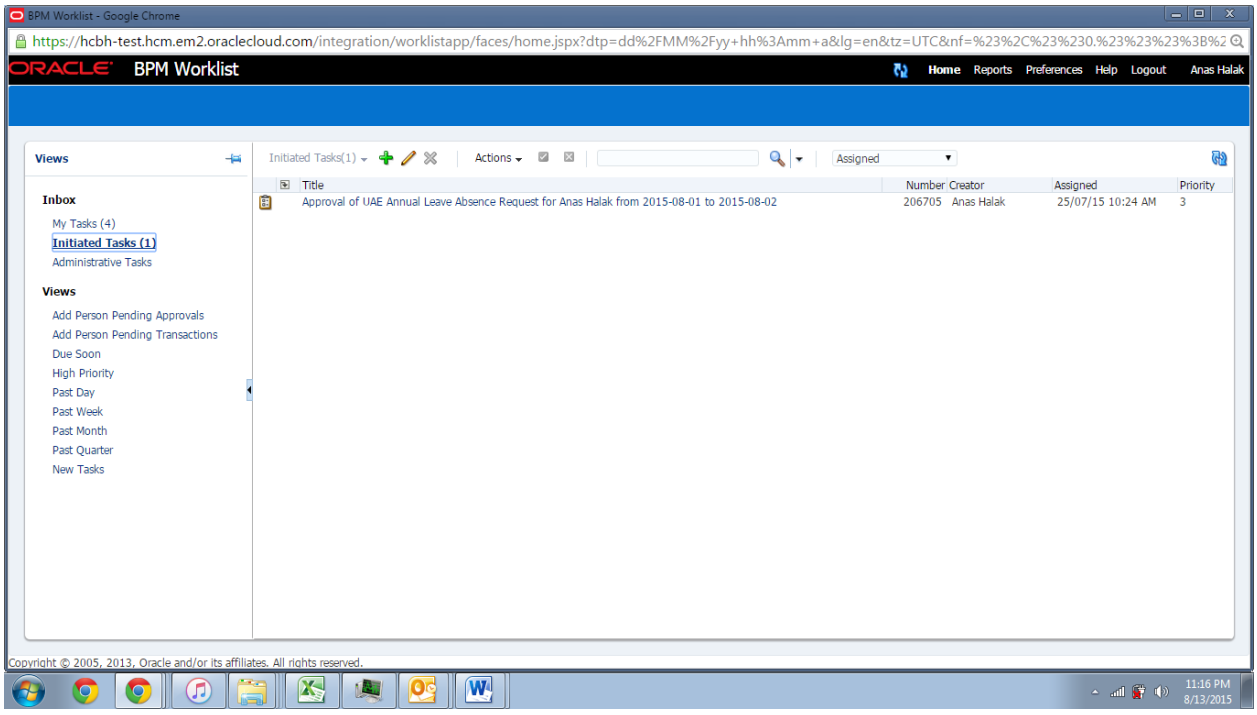


Click on Human capital Management link

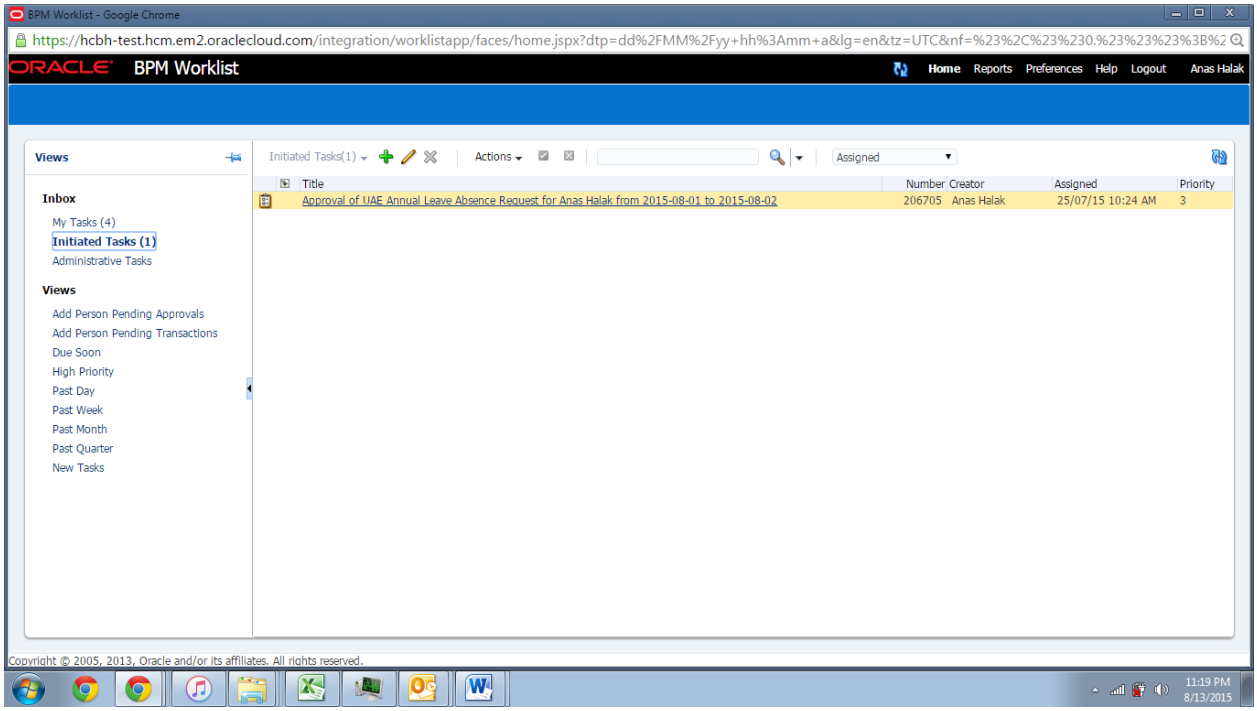


Another window will open

Click on Initiated Task → which shows the list of leave application applied and waiting for approval



Click on the link



Another window open up

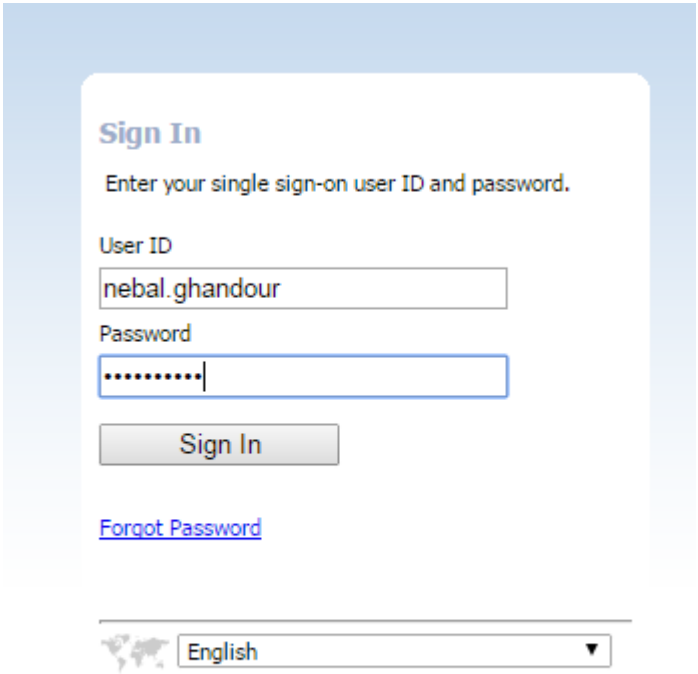
From the assignee name, approval pending with which person can be understood

3. Manager Self Service

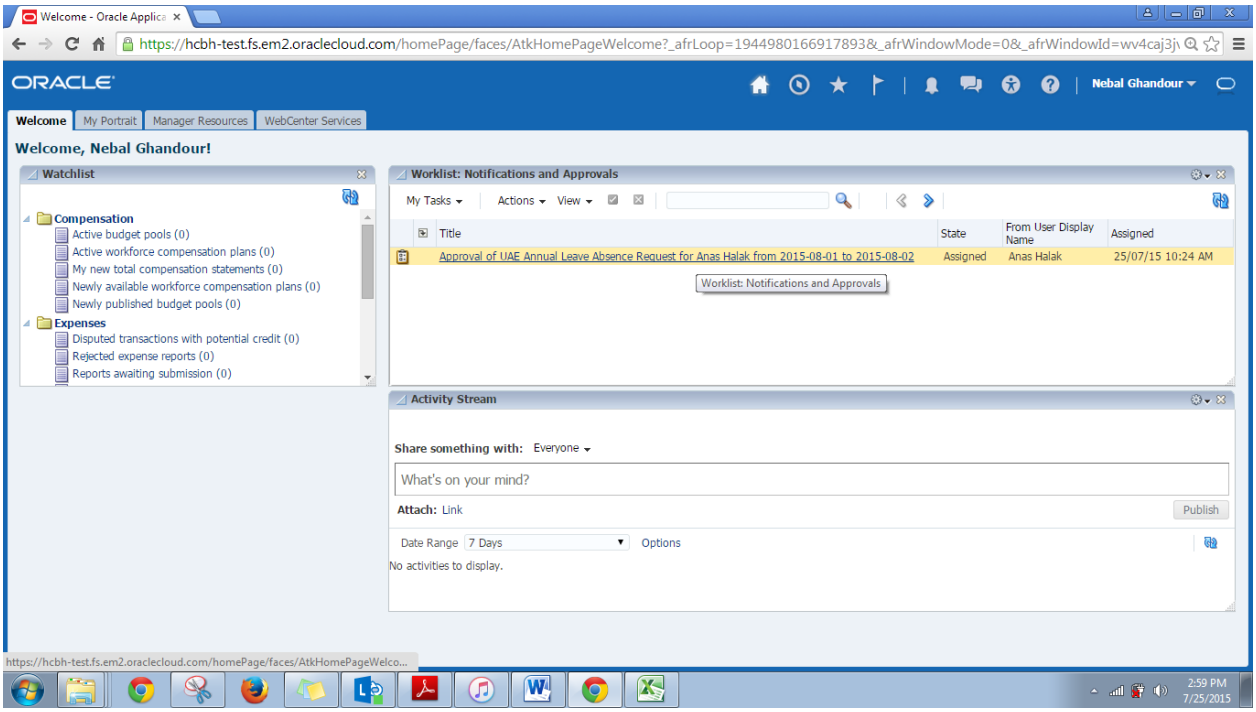
3.1. How to approve or reject leave by login in to the Oracle application

(Note: How to apply leave – refer topic 1 under Employee Self Service)

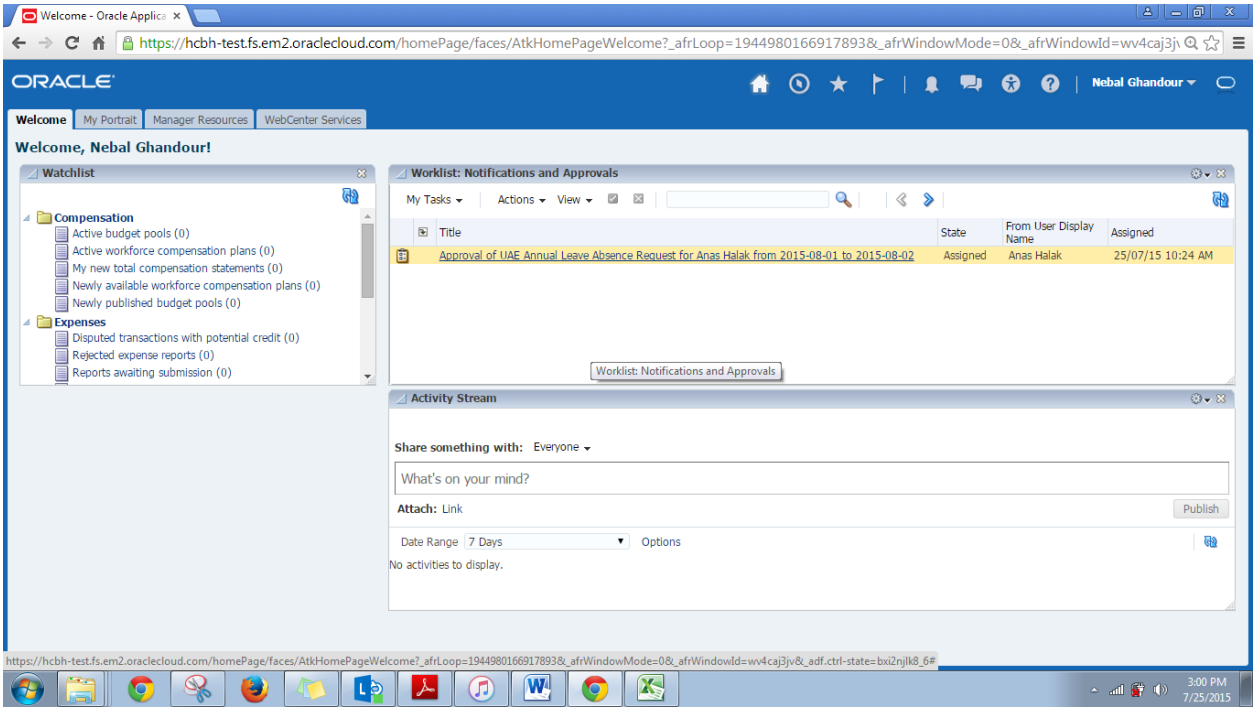
Step 1: Login with the given user name and password (User should have Line manager role)

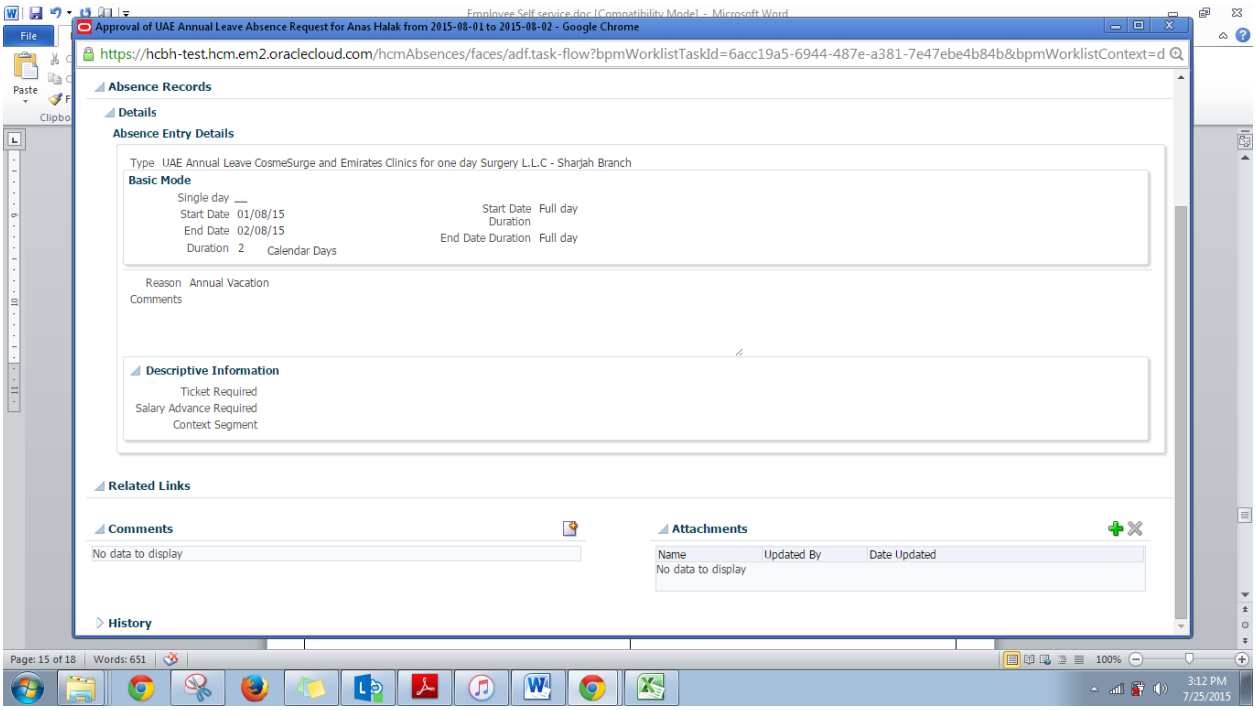


Step 2: in the home page, under work list Notification and Approvals, absence record awaiting for approval will be listed



Step 2: Click on the link which you want to check and approve.



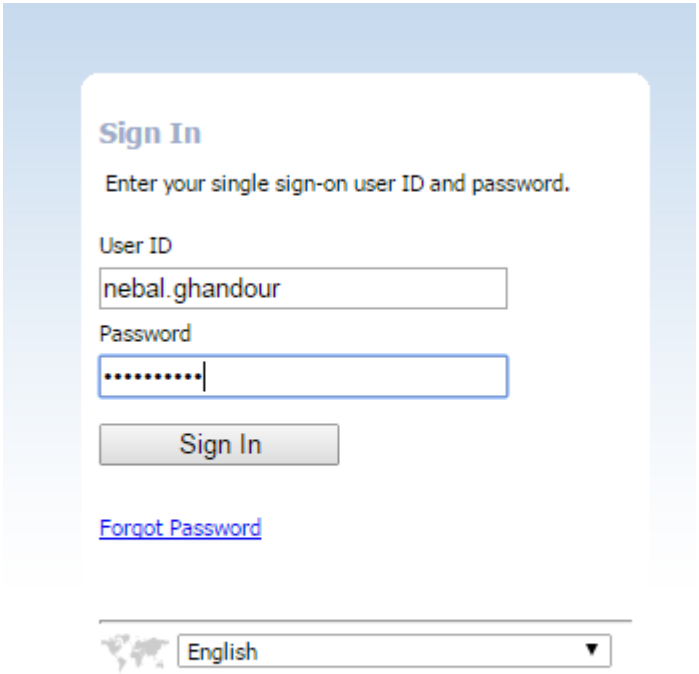


Fields to be checked before approval	**Explanation**
Heading in Bold and Blue Colour	Type of leave, Employee Name and leave date range
Assignee	Approver User Name
From	Employee User Name
Absence Entry Details →Type	Type of leave eg. Annual leave, sick leave, unpaid leave etc
Start Date	Leave Start Date
End Date	Leave End Date
Duration	Total Leave Days
Reason	Reason for the leave
Comments	Additional information for the Leave
Attachments	If Employee attached any document for the leave application which can be viewed and approved.

Step 3: Click on approve or Reject.

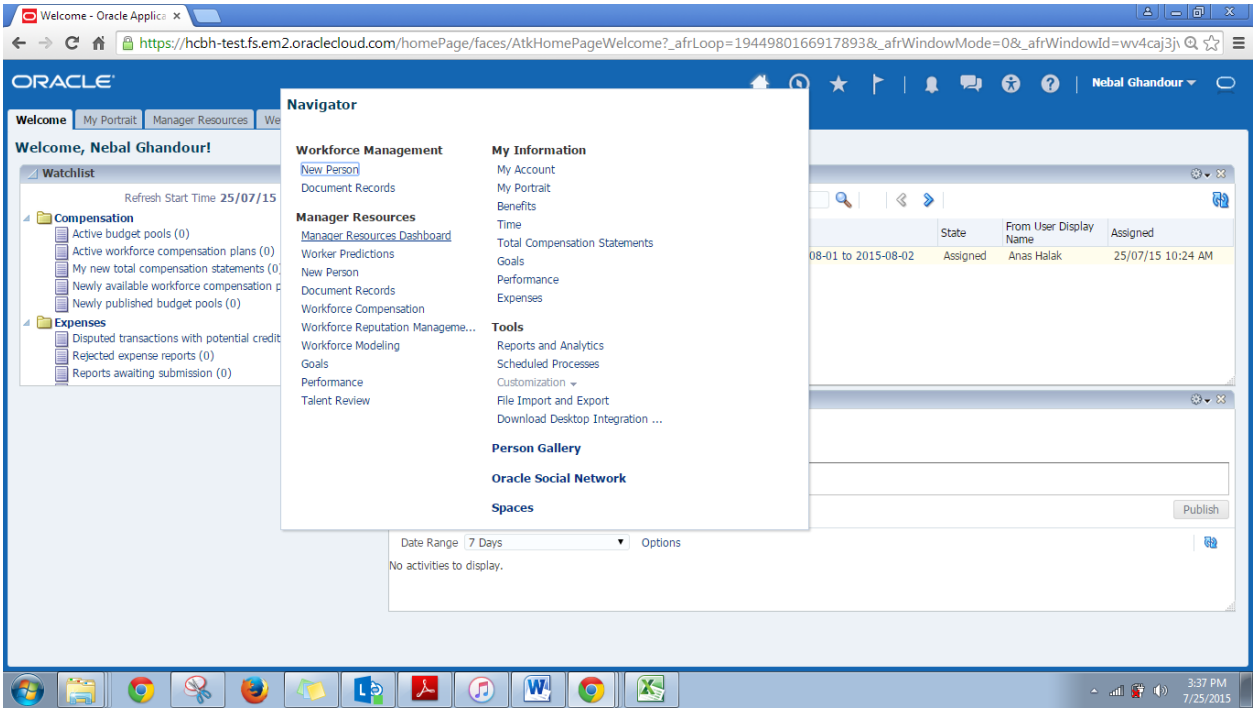
3.2. How to apply leave to a sub ordinate

Step 1: Login with the given user name and password (User should have Line manager role)

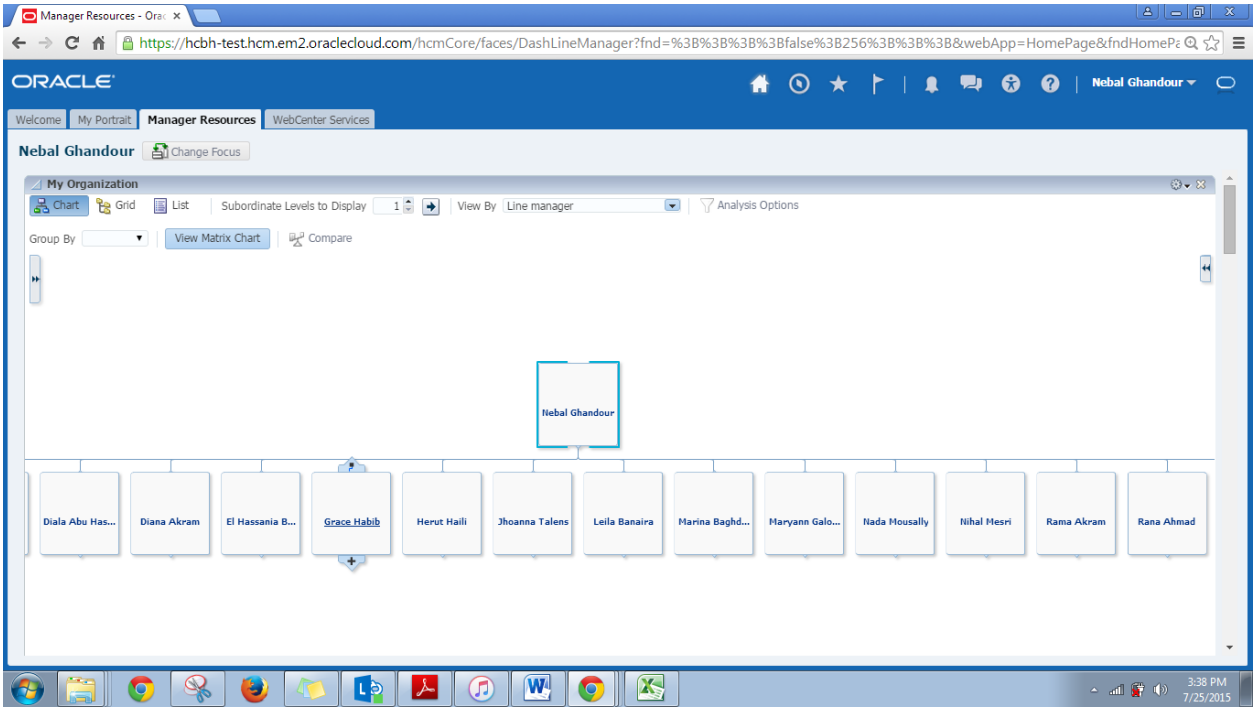


Step 2:

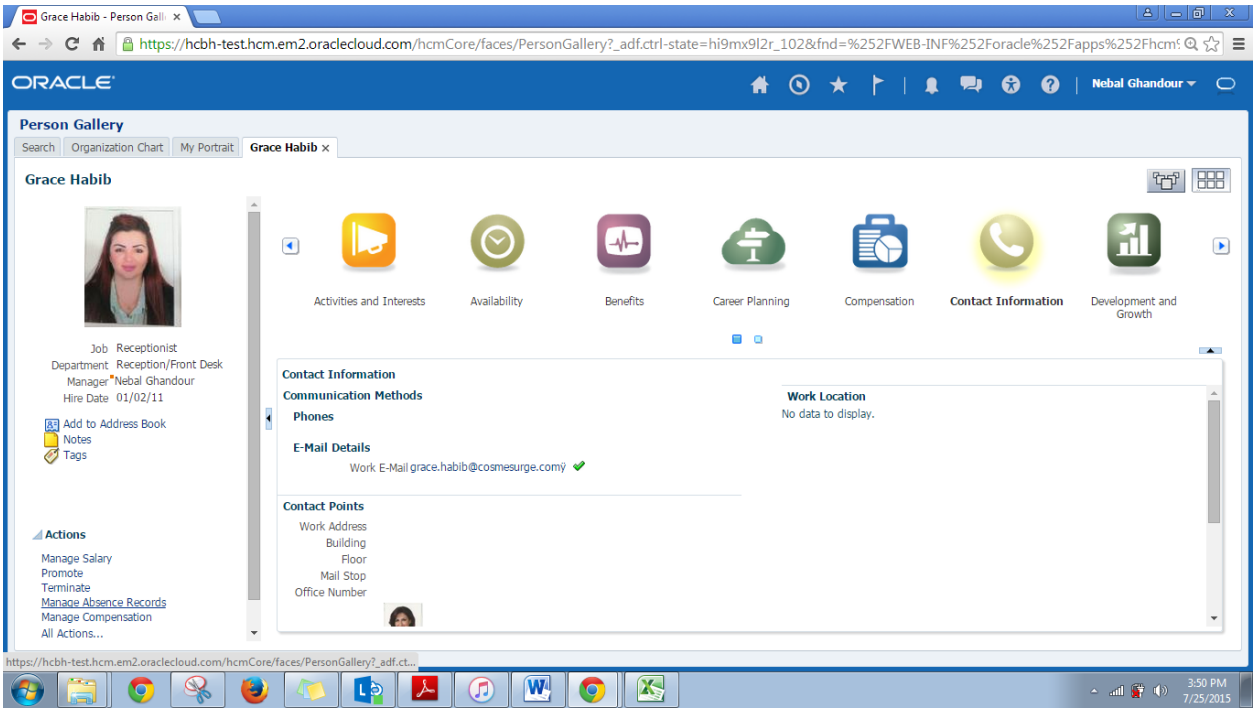
Click on Navigator → Manager Resource Dashboard



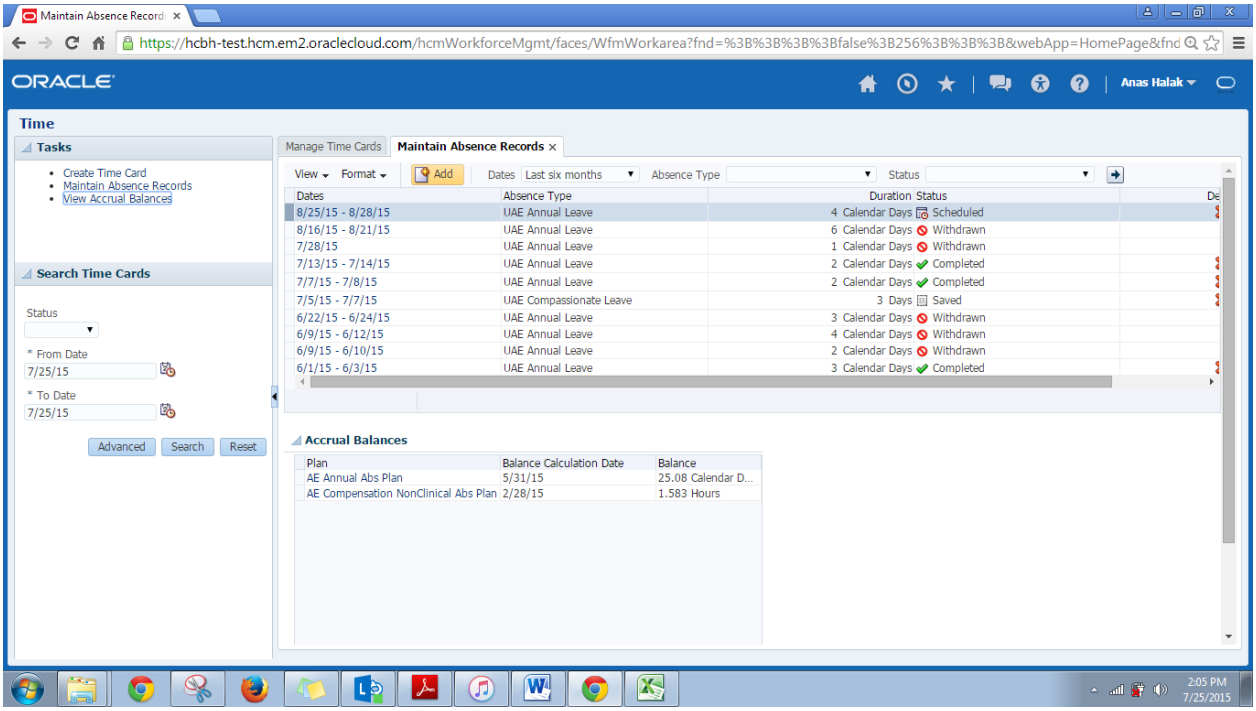
Step 2: Click on the employee Name for whom leave has to be applied



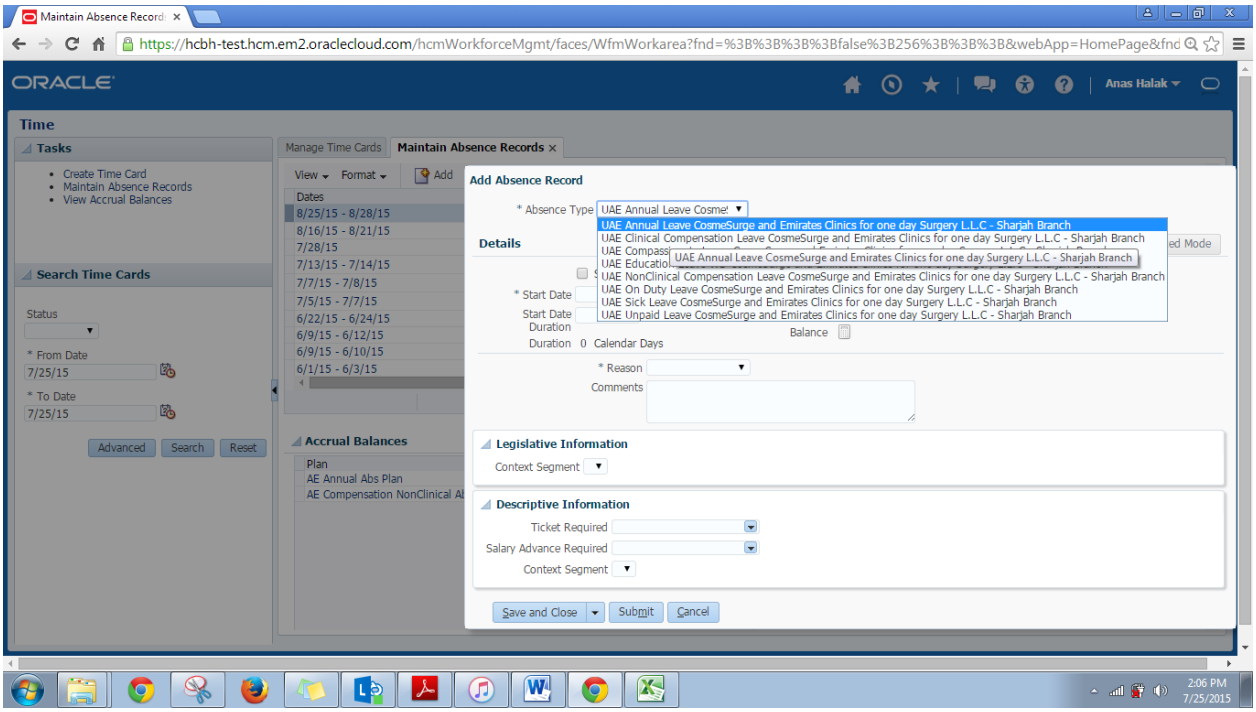
Step4: Click on Manage Absence Records



Step 4: To add New Absence Record click on ADD



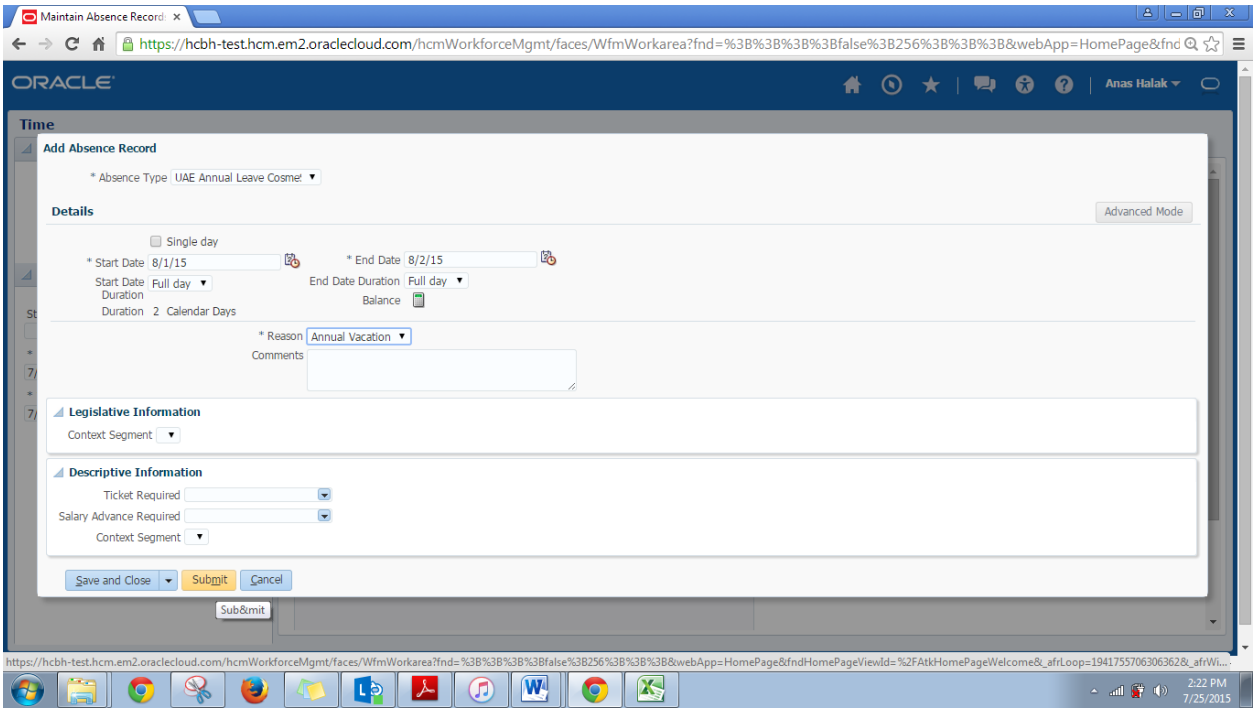
Step 5: select absence type to be recorded



Step 6: Fill the details

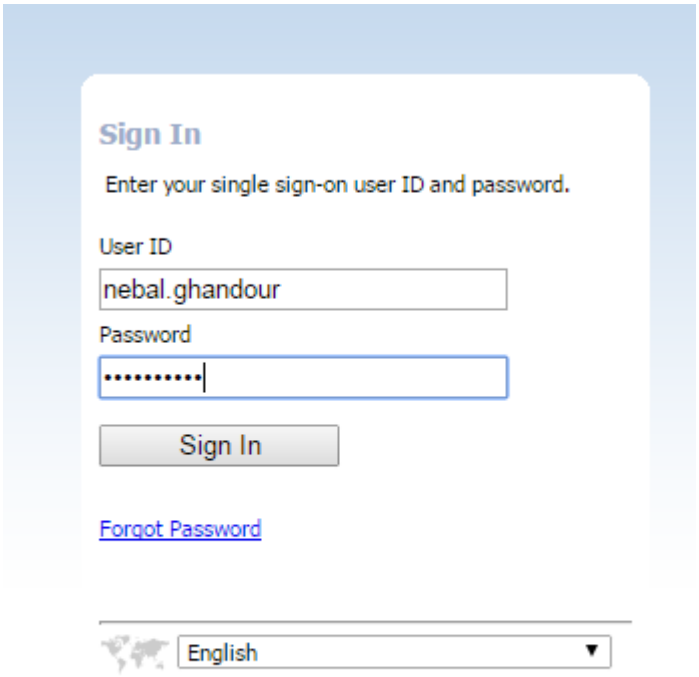
Field Name	**Explanation**
Single Day (Check box)	Select if leave needs to be applied for one day
Start Date	Leave start date
End Date	Leave End date
Start Date Duration/End Date Duration	Auto filled based on start date and end date selection
Reason	Select one of the reason for the absence
Comments	Any additional information needs to be conveyed to manager for the leave approval
Ticket Required	Select yes - If against annual leave Ticket needs to be issued
Salary Advance Required	Select yes - If against annual leave salary advance is required

Step 7: Click submit → leave will be submitted for your approval.

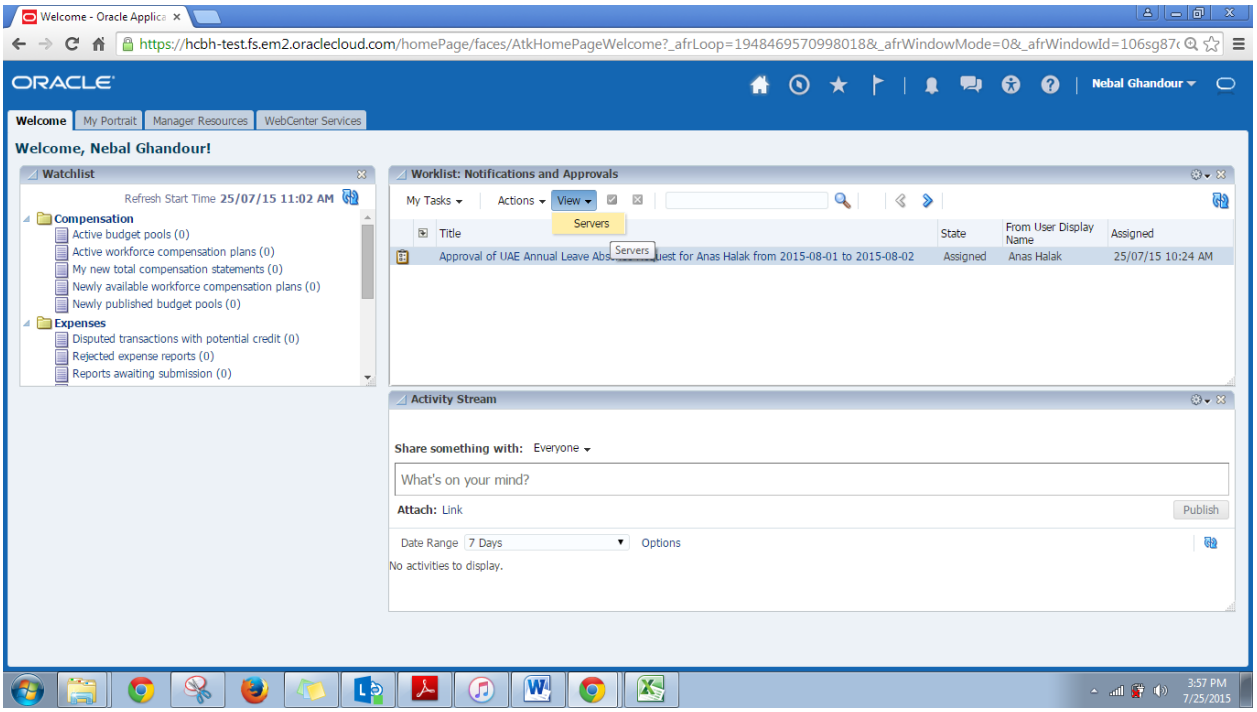


3.3. How to delicate approvals during vacation

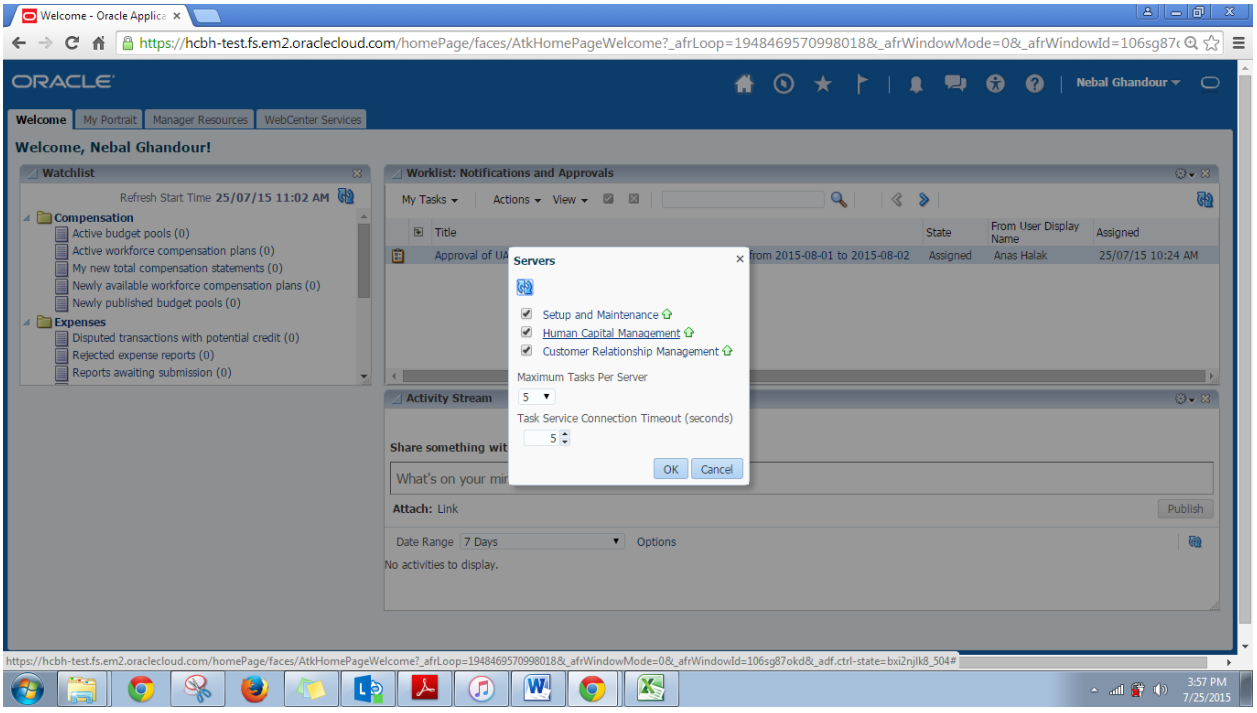
Step 1: Login with the given user name and password (User should have Line manager role)



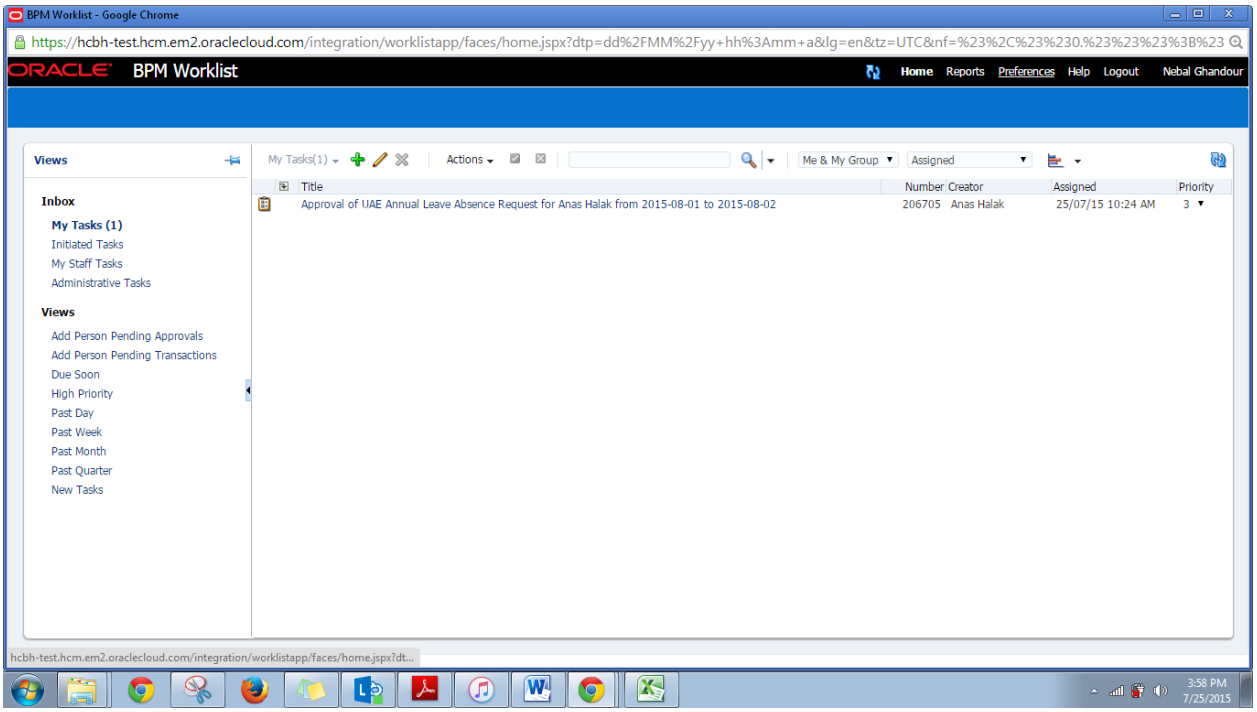
Step2: in the home page Under Worklist :Notifcation and Approvals → Click View → Servers



Step 3: Click on Human Capital management

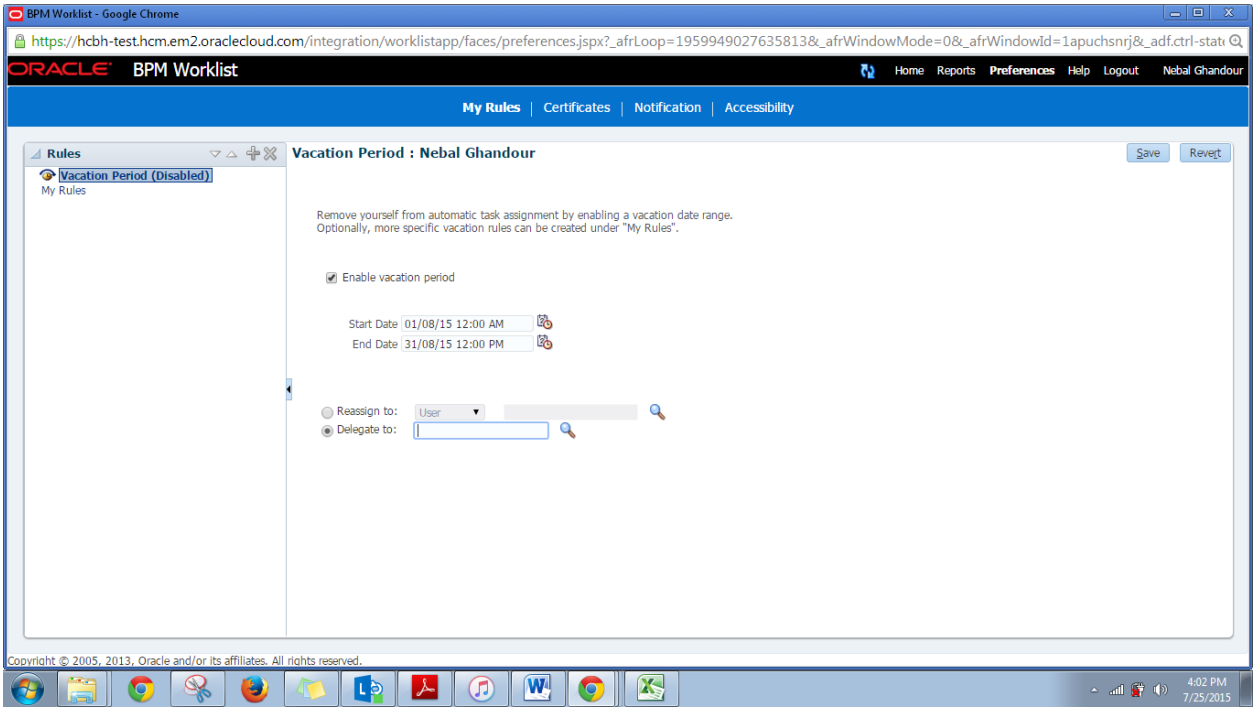


Step 4: Another window (enable pop up blocker if required) → Click Prefernces

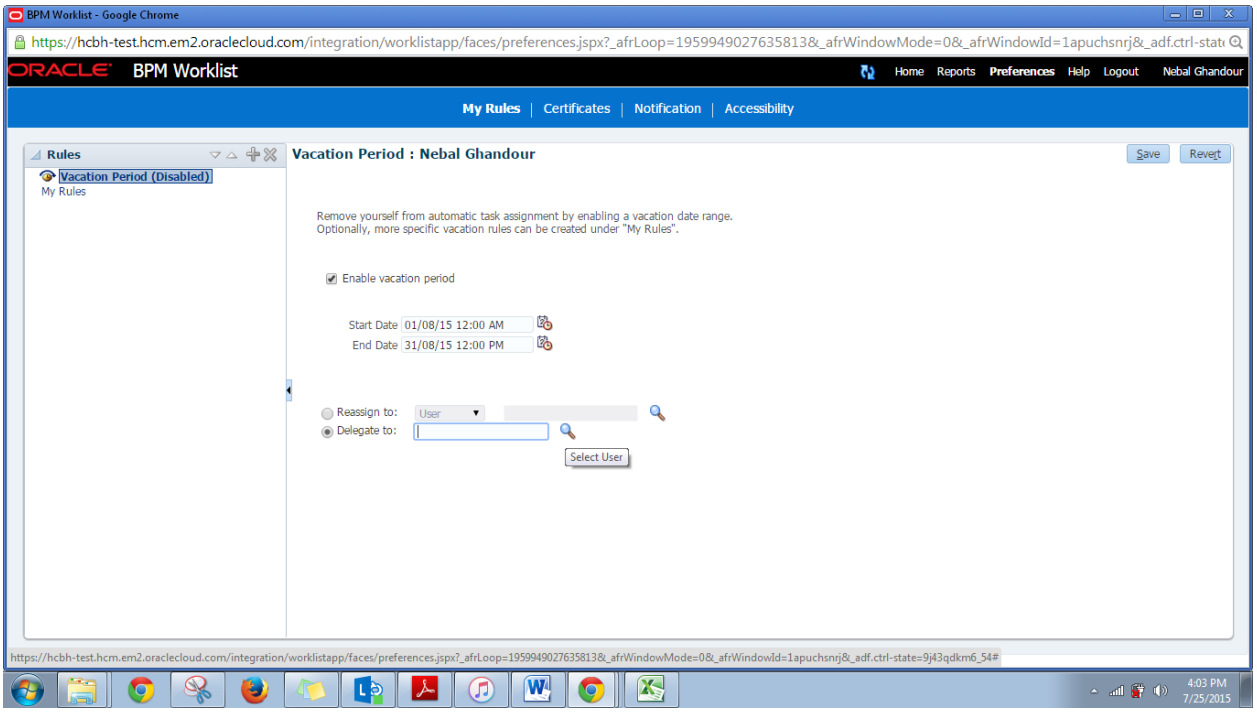


Step 5:

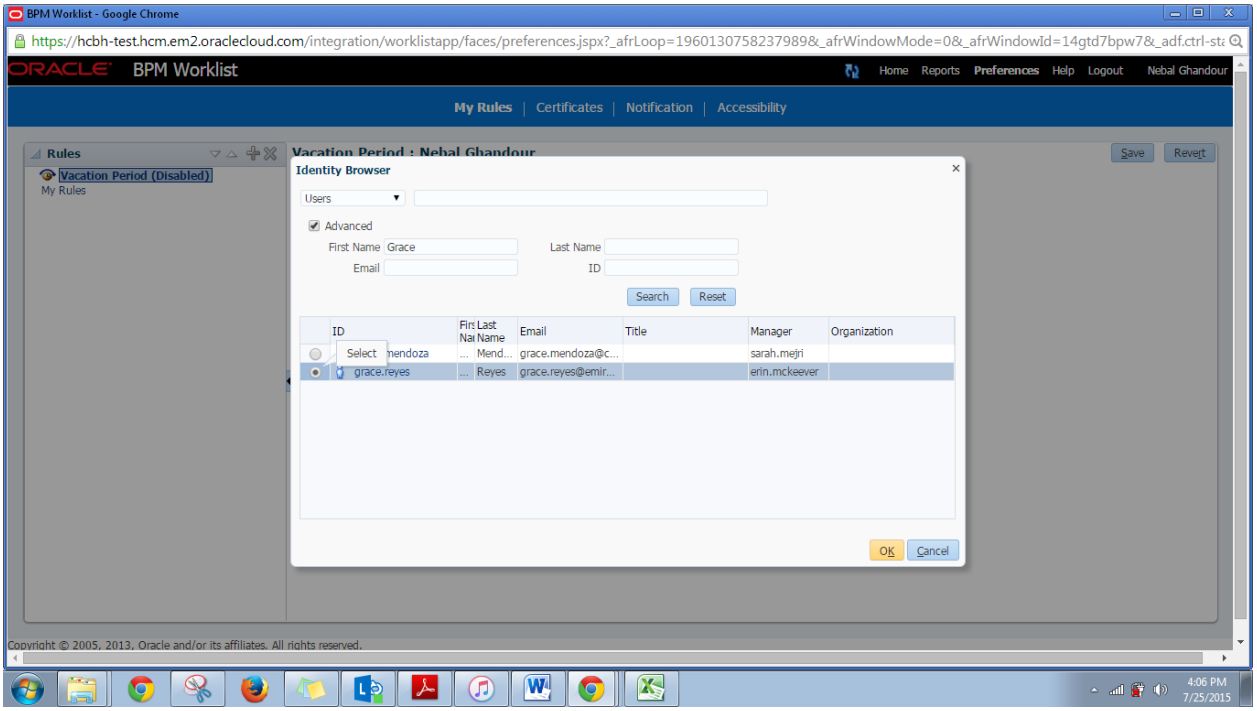
Click on Enable Vacation period, Enter the start date (vacation start date) and end Date (vacation end date), delegate to . Note: select start date and end date from icon since time also has to be given


BPM Worklist - Google Chrome
https://hcbh-test.hcm.em2.oraclecloud.com/integration/worklistapp/faces/preferences.jspx?_afrLoop=1959949027635813&_afrWindowMode=0&_afrWindowId=1apuchsnrj&_adf.ctrl-stat
ORACLE BPM Worklist
Home Reports Preferences Help Logout Nebal Ghandour
My Rules | Certificates | Notification | Accessibility
Rules
Vacation Period (Disabled)
My Rules
Vacation Period : Nebal Ghandour
Save
Revert
Remove yourself from automatic task assignment by enabling a vacation date range.
Optionally, more specific vacation rules can be created under "My Rules".
Enable vacation period
Start Date 01/08/15 12:00 AM
End Date 31/08/15 12:00 PM
Reassign to:
User
Delegate to:
Copyright © 2005, 2013, Oracle and/or its affiliates. All rights reserved.
4:02 PM
7/25/2015

Step 6: Search the user by clicking on the magnifier

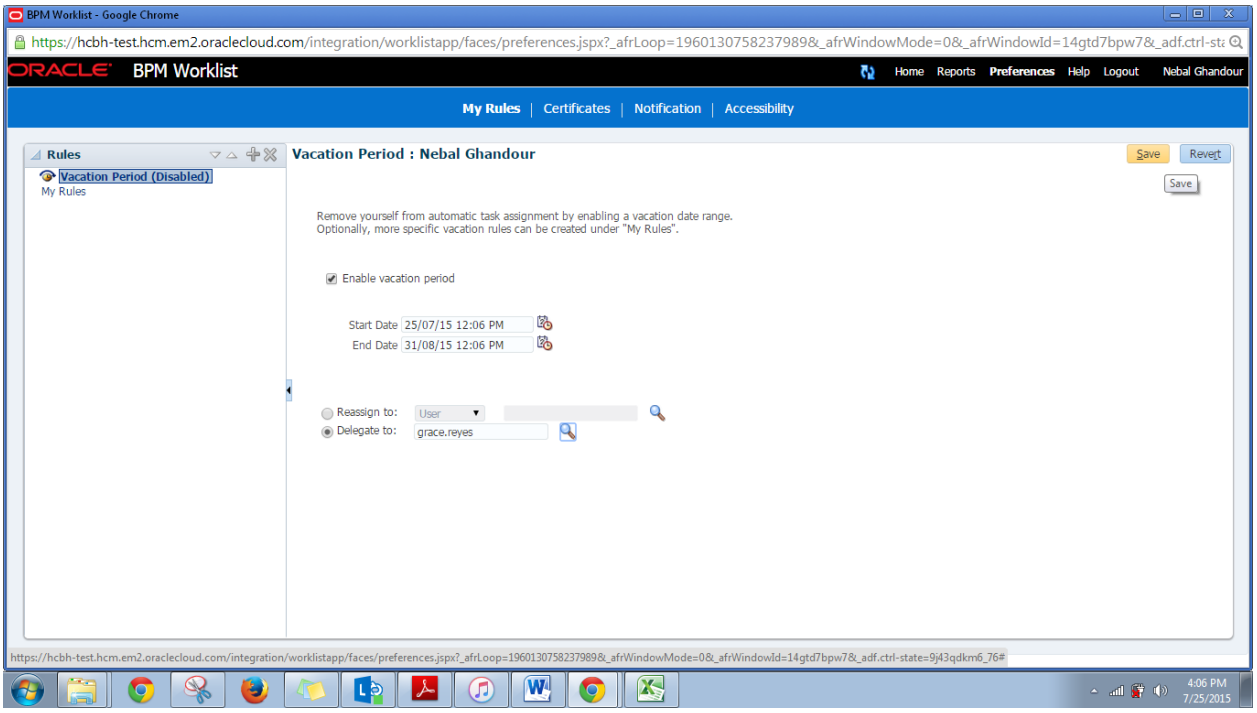

BPM Worklist - Google Chrome
https://hcbh-test.hcm.em2.oraclecloud.com/integration/worklistapp/faces/preferences.jspx?_afrLoop=1959490276358138_afrWindowMode=0&_afrWindowId=1apuchsnrj&_adf.ctrl-stat
ORACLE BPM Worklist
Home Reports Preferences Help Logout Nebal Ghandour
My Rules | Certificates | Notification | Accessibility
Rules
Vacation Period (Disabled)
My Rules
Vacation Period : Nebal Ghandour
Save Revert
Remove yourself from automatic task assignment by enabling a vacation date range.
Optionally, more specific vacation rules can be created under "My Rules".
Enable vacation period
Start Date 01/08/15 12:00 AM
End Date 31/08/15 12:00 PM
Reassign to: User
Delegate to:
Select User
4:03 PM
7/25/2015

Click ok


BPM Worklist - Google Chrome
https://hcbh-test.hcm.em2.oraclecloud.com/integration/worklistapp/faces/preferences.jspx?_afrLoop=1960130758237989&_afrWindowMode=0&_afrWindowId=14gtd7bpw7&_adf.ctrl-st
ORACLE BPM Worklist
Home Reports Preferences Help Logout Nebal Ghandour
My Rules | Certificates | Notification | Accessibility
Rules
Vacation Period (Disabled)
My Rules
Vacation Period : Nebal Ghandour
Save Revert
Identity Browser
Users
Advanced
First Name Grace
Last Name
Email
ID
Search Reset
ID
First Name
Last Name
Email
Title
Manager
Organization
Select
grace.mendoza@c...
sarah.mejri
grace.reyes
Reyes
grace.reyes@emir...
erin.mckeever
OK Cancel
Copyright © 2005, 2013, Oracle and/or its affiliates. All rights reserved.
4:06 PM
7/25/2015

Step 7: Click save

Till the period mentioned all approval will go to the person given in delegate to after which approval automatically will be start triggering to you.


BPM Worklist - Google Chrome
https://hcbh-test.hcm.em2.oraclecloud.com/integration/worklistapp/faces/preferences.jspx?_afrLoop=19601307582379898_afrWindowMode=0&_afrWindowId=14gtd7bpw7&_adf.ctrl-st
ORACLE BPM Worklist
Home Reports Preferences Help Logout Nebal Ghandour
My Rules | Certificates | Notification | Accessibility
Rules
Vacation Period (Disabled)
My Rules
Vacation Period : Nebal Ghandour
Save
Revert
Save
Remove yourself from automatic task assignment by enabling a vacation date range.
Optionally, more specific vacation rules can be created under "My Rules".
Enable vacation period
Start Date 25/07/15 12:06 PM
End Date 31/08/15 12:06 PM
Reassign to: User
Delegate to: grace.reyes
4:06 PM
7/25/2015